SERVICES DESCRIPTIONS FOR THE OPTIMIZELY SOFTWARE SERVICE

Introduction

About this Services Description

This Services Description provides a high-level description of technical features, functions and capabilities of the Software Service for its customers.

This Services Description applies to the following Software Service:

Contents

Service Descriptions: Optimizely Software Service

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Optimizely Confidential Information. Customer use only with its Software Service Subscription

Introduction

The Services Description also describes certain subscription services, and also other optional services, that Customers may purchase with their subscription to Software Service.

The revision history of this Services Description is highlighted in the above index.

This Services Description constitutes Documentation for the limited purpose of the warranty under Customers' subscription agreement with Optimizely. It does however not create any additional warranties or obligations beyond those expressly stated in such agreement.

Each of the technical features, functions and capabilities of a Software Service in this Services Description may be described in greater detail in the other Documentation for that Software Service. That Documentation is available to the Authorised Users of a Customer from within the Software Service, or from the other Documentation libraries (https://support.optimizely.com/hc/en-us and https://docs.developers.optimizely.com).

The Services Descriptions are not an exhaustive list, and specific features may vary based on subscription level and package.

Other Documentation will be made available at this site from time to time as it is published by Optimizely and its Customers. Other Documentation may be available to Customers at the general Optimizely support @ https://support.optimizely.com/hc/en-us. Registration as a customer may be required to access Optimizely Documentation URLs, and content.

Optimizely reserves the right to modify the features, functions and capabilities of the Software Service in accordance with its rights under the Software Service subscription agreement.

All Documentation is Optimizely confidential information, and all intellectual property rights are expressly reserved by Optimizely.

Documentation is made available in the English language only. Any other language version is for informational only. The English-language versions are the only Optimizely-approved Customer versions.

Documentation URLs and the content available at those URLs are subject to change. All Documentation is updated from time to time.

This Services Description replaces all prior-published Service Descriptions

Common Descriptions to All Software Service

Hosting regions. Optimizely's hosting regions (data center locations) are hosted by MS Azure, Google Cloud Platform, and Amazon Web Services. Not all Data Centers offered by Amazon Web Services, MS Azure and Google Cloud Platform are made available by Optimizely, and not all Software Service may be made available in an available Data Center of MS Azure, Google Cloud Platform or Amazon Web Services. Available Hosting Regions listed in this Service Description are subject to update. Available Data Center for Software Service are available from Optimizely upon request.

Hosting services. Optimizely provides a service level commitment for the Software Service - Service Level Agreement. The Service Level Agreement is part of a Customer's Software Service subscription, and is referenced in the Customer's Order Form. The technical availability of the Software Service is also stated in the Order Form.

Optimizely Product Supplement. The Optimizely Product Supplement — available at Optimizely's Product Use Terms (formerly, the Product Supplement) — applies to all Optimizely Software Service.

Customer Data Use By Optimizely. Section 1.12 of Optimizely's [Product Use Terms](#) controls Optimizely's rights with respect to Customer Data. To the extent that the Product Use Terms may not be part of the Customer's Subscription Agreement, then the following applies: Subject to the further provisions of this section on Customer Data use by Optimizely), in addition to Optimizely's right to use Customer Data to provide the Software Service to Customer, Optimizely may also utilize Customer Data for the following ancillary purposes: (I) to create Performance Data, (ii) for Reporting, (iii) providing Support, and (iv) in the development of the Software Service, including the development of new capabilities and features ("Development") - (collectively, "Data Use"). *Data Use Restrictions.* The following restrictions, apply to Data Use ("Data Use Restrictions"): A.- Performance Data may be utilized by Optimizely provided it is aggregated and anonymized, for the purpose of compiling and analyzing statistical information specifically pertaining to the performance, provisioning and/or operation of the Software Service; B.- Customer Data Use is subject to the same confidentiality and non-disclosure protections applicable to Customer Data generally as outlined in the Agreement; C. – Reports are Confidential Information; D.- Optimizely's access to and utilization of any Personal Data in Support is subject to Optimizely's obligations under the Agreement; E.- Customer Data Use is subject to the technical and organizational measures outlined in the Agreement so as to ensure appropriate security of that data; F.- No Customer Data Use will be undertaken with the objective of identifying individual data subjects; G.- Optimizely will not use any Personal Data that reveals any racial or ethnic origin, political opinions, religious or philosophical beliefs, trade union membership, genetic data, biometric data for the purpose of uniquely identifying a natural person, data concerning health or data concerning a natural person's sex life or sexual orientation; and H. Neither Reporting, Support nor Development will disclose any Customer Data (including any Personal Data) to any other Customer or Third-Party (other than Third-Parties engaged by Optimizely in delivery of the Software Service, and Reporting and Development (and then only under appropriate confidentiality undertakings to Optimizely)); and I.– whilst Development may reveal Personal Data (such as an Authorized User's identity), its use in Development by Optimizely will be strictly limited to the purpose of Development of that Software Service, and the identification of how current features and capabilities are utilized by Customers and its Authorized Users for the sole purposes of the development of further features and capabilities of that Software Service. Any such Personal Data use in Development is subject to the above Customer Data Use Protocols*, HIPAA*. Protected Health Information may only be used by Optimizely in accordance with its HIPAA obligations as a Business Associate, and only in accordance with the Business Associate Agreement (BAA) with that Customer, notwithstanding the rights of Optimizely under Data Use above. Any authorized Use by Optimizely will be undertaken only in accordance with the HIPAA Security Rule and Privacy Rules, and de-identified, and then only utilized by Optimizely in a data set that is aggregated and anonymised. Any Protected Health Information utilized by Optimizely in its provision of the Software Service is as authorized by Customer in accordance with the Customer's Subscription Agreement (including the BAA), but it may only be utilized by Optimizely as de-identified data (in accordance with the HIPAA Privacy Rule). *Performance Data* means data generated by the Software Service, whether manually or automatically, with respect to how the Software Service is being used by the Customer. *Reporting* means reports produced by Optimizely, whether manually or automatically, with respect to the Software Service utilizing Performance Data and Technical Data, whether for its own purposes (so far as relevant to the Software Service and Customer's Use), and/or the benefit of the Customer, and whether at the Customer's request, or at Optimizely's initiative. *Technical Data* means information such as geo-location, bandwidth, ISP, proxy, domain, demographic and other such data with respect to Software Service Use that Optimizely may make available in Reports.

Data Retention & Access. Data Access, Retention, Retrieval and Destruction is outlined in the Product Supplement

Free Access Subscriptions and Beta Releases. Free Access Subscriptions and Beta Releases is outlined in the Product Supplement**.**

Affiliates' Customer Data. If the Customer grants access to its Software Service to any of its Affiliates, and Customer has not subscribed to a separate site (also called instance or tenant) for each Affiliate (for an additional fee), Customer acknowledges that it and its Affiliates might have access to each other's data in the single shared site. Customer is responsible for fulfilling any necessary consent requirements for this shared data access between it and its Affiliates.

Professional Services. Some aspects and elements of the Software Service require Professional Services, which are available from Optimizely's Expert Services directly, under separate statements of work, and for fees payable directly to Optimizely. In the absence of Optimizely's Professional Services general terms and conditions (or other separate written agreement) governing any such statement of work, Optimizely's Professional Services Supplement applies to those Professional Services

Options and Add-ons. Items listed as an 'option' or 'add-on' are not included in the Software Service, but may be added to a Customer's subscription for the applicable Software Service an additional fee at Optimizely's then-current price.

Translations. Optimizely may provide translations of some documentation in languages other than English. The English version of this Services Description and any other Documentation shall govern in case of a discrepancy between the English version and a translated version.

Sub-processors. The sub-processors for the Software Service are published at Optimizely's Sub-processors (Affiliate & Non-Affiliate), as updated from time to time.

Onboarding. Onboarding is a pre-paid pre-defined scope-limited professional service that Optimizely provides Customers as part of the Software Service, if purchased in its initial Order Form. It provides a technical overview for configuration, implementation support, and a pre-launch checklist. **Note:** *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.

APIs, SDKs, MCPs. Use of APIs, SDKs, and MCPs are made available to Customers are subject to Optimizely-published API and SDK terms of use. Optimizely's APIs may be used by Customers only for the following purposes (and none other): (i) to develop the Customer software and customize and configure Customer's systems and networks solely as necessary to interface with Optimizely's servers; (ii) create modified code and incorporate the sample code, code library or modified code into the Customer software; (iii) use sample code, the code library or modified code incorporated in Customer software to interface with Optimizely's servers; and (iv) access the Optimizely's servers and send and receive Customer Data, Customer functionality, and/or Customer business logic to and from Optimizely's servers. Customer may improve, prepare derivative works of or otherwise modify the Optimizely APIs. API keys are Optimizely Confidential Information. Optimizely's API, SDK and MCP use terms are published at Optimizely's API, SDK, and MCP Terms.

Third-Party Applications and Platform Integrations. Some Software Service may contain functionality enabling Third-Party Enhancements (also referred to as Third-Party Add-Ons) to be utilized by Customers in their use of the Software Service. Use of Enhancements is subject to Product Supplement, this Service Description and applicable Documentation. Use of any Third-Party Enhancements is subject to the applicable Third-Party publisher license (TPPL). If the Customer does not want to accept the TPPL, Customer should not utilize that Third-Party Enhancement. Optimizely's Third-Party add-ons and platform integration terms are made available within the applicable Software Service, and are published at Optimizely's Third-Party Applications & Platform Integrations.

Development and Sandbox Environments: On-prem licenses, and development and sandbox environments, may be provided by Optimizely for Partner's demonstration purpose, subject to the following conditions. The licenses and access to those environments is limited to non-production and non-commercial use. These environments may also be subject to additional terms and Optimizely policies. Access may be suspended, limited, or terminated at Optimizely's discretion. The License and Environments are at no cost to the Partner. Depending on the specific

Software Service and setup requirements, there may be additional costs related to access or configuration. If such additional costs apply, Optimizely will communicate those additional costs, and the Partner will have the opportunity to review and approve them before proceeding.

Customer User Acceptance Policy. Optimizely's Customer Acceptable Use Policy, as updated from time to time, applies to all Software Service.

Support Portal. The Optimizely Support Portal is published by Optimizely at https://support.optimizely.com/hc/en-us, where Optimizely publishes Documentation, information on releases and related Software information, and other relevant information about the Software Service, as updated from time to time.

Release Notes. Release notes are published by Optimizely at https://support.optimizely.com/hc/en-us/articles/11296547622669, as updated from time to time.

Privacy, Security and Transparency. Refer to https://www.optimizely.com/trust-center/.

Service Continuity. See [Service Continuity] below.

Service Dashboard. Optimizely makes available a Service Dashboard (https://status.optimizely.com) from where Customers can register incident updates and view information about platform-wider maintenance.

Opti ID

Opti ID is a single sign-on (SSO) solution for Optimizely Software Service. It provides a single login point where you can switch between your Optimizely Software Service with just one authentication. It also provides a single location to manage your users for each Optimizely Software Service.

Additional features

- Usage and billing dashboards for supported Software Service.
- Billing notifications for Experimentation and Content Marketing Platform.
- Credit usage dashboard and notifications for Optimizely Opal.
- Reporting may be available within Opti ID for some Software Service.
- Ability to configure Opti ID with Customer's identity provider (IdP) and supports System for Cross-domain Identity Management (SCIM) for provisioning.

Limitation

Opti ID is for use by the Customer with respect to Optimizely Software Service only. Opti ID is not intended for, or authorised for use by the Customer, for access to Third-Party applications, software or platforms.

Customer shall not Use Opti ID to manage visitor logins for any Optimizely Software Service.

Use By Optimizely

Opti ID may be used by Optimizely's Finance and/or Legal departments to restrict access to a Customer's Software Service in the case of a Customer's delinquency in its payment of Fees, and/or other uncured breaches under its Subscription Agreement.

EU DORA

Effective 1 January 2025, Optimizely as an ICT Service Provider as defined under EU DORA can support DORA-regulated EU customers with their DORA requirements and their access to and use of the Software Service. An Optimizely-approved DORA supplement will be required for Optimizely's DORA commitments. Any DORA-relevant restriction with Software Service will be highlighted the applicable Service Description below.

US HIPAA

Effective 1 January 2025, Optimizely as Business Associate can support HIPAA-regulated US customers with their HIPAA requirements as Covered Entities, and their access to and use of the Software Service. An Optimizely-approved Business Associate Agreement ('BAA') will be required for Optimizely's commitments to the HIPAA Rules. Only those Software Service identified as an ePHI-enabled applicable Software Service in the Service Descriptions below are available as HIPAA supported.

Australian Prudential Regulation

Effective 1 January 2025, Optimizely can support Australian APRA-regulated customers with their Australian Prudential Standard CPS 230 & 234 requirements and their access to and use of the Software Service. An Optimizely-approved CPS Supplement will be required for Optimizely's Prudential Standard CPS 230 & 234 support of APRA-regulated Customers. Any CPS-relevant restriction with Software Service will be highlighted the applicable Service Description below.

Artificial Intelligence

Optimizely's Software Service incorporate AI and machine learning ("ML"), including generative AI ("GenAI"). Each of the Services Descriptions will identify the AI, ML, and GenAI features. For GenAI features, the applicable Service Description will outline the Large Language model (ChatGPT Open AI, ChatGPT or Google Gemini) used. The applicable LLM data use and privacy terms are set out below. Customers should review those use and privacy terms in relation to their GenAI use. The applicable Service Descriptions will highlight how a Customer can request GenAI to be turned off. The primary LLM is listed in each Service Description and, if applicable, features may have identified fallbacks to other secondary LLMs if the primary LLM is down.

Effective May 7, 2025, access to Optimizely Opal features across Content Marketing Platform, Web Experimentation, Feature Experimentation, Personalization, Content Management System (SaaS), Collaboration, and Optimizely Data Platform will transition to a credit-based usage and billing model. Refer to the release notes published on April 11, 2025 for each affected product.

GenAI policies and terms of use

Customer Content. Customers may provide Input to the GenAI feature, and will receive Output from the LLM underlying the GenAI feature (collectively "Content"). Customers are responsible for Content, including ensuring that it does not violate any applicable law or the terms of use and privacy policies of the LLM. Customers must ensure that they have all rights, licenses, and permissions needed to provide the GenAI feature Input.

Ownership of content. As between the Customer and Optimizely, and to the extent permitted by applicable law, the Customer retains its ownership rights in Input and owns the Output. As between the Customer and the LLM, and to the extent permitted by applicable law, the Customer also retains its ownership rights in Input and owns the Output. The LLMs assign to the Customers any right, title, and interest, if any, in and to Customer Output.

Similarity of Content. Due to the nature of GenAI services and artificial intelligence generally, Output may not be unique, and other users may receive similar output from the applicable GenAI service. The LLM's assignment of any interest in Customer Output does not extend to other users' output or any Third-Party Output.

Acknowledgements. When you use Optimizely's GenAI features, Customers do so with their understanding and acknowledgement that Output may not always be accurate, and Customers should not rely on Output from that GenAI features as a sole source of truth or factual information, or as a substitute for professional advice, and Customers must evaluate Output for accuracy and appropriateness for their use case, including using human review as appropriate, before using or sharing Output from the GenAI features. Customers must not use any Output relating to a person for any purpose that could have a legal or material impact on that person, such as making credit, educational, employment, housing, insurance, legal, medical, or other important decisions about them. Optimizely's GenAI features may provide incomplete, incorrect, or offensive Output that does not represent Optimizely's views. If Output references any Third-Party products or services, it doesn't mean the Third-Party endorses or is affiliated with Optimizely.

The GenAI LLM's utilized by Optimizely may not satisfy Customer's HIPAA requirements as a Covered Entity. Customers should not use any GenAI feature to transmit ePHI until they have satisfied themselves as to the LLM's HIPAA compliance, and Customer has a HIPAA Business Associate Agreement with Optimizely. Upon request by Customer, Optimizely can confirm whether a GenAI LLM says it is HIPAA compatible, and if Optimizely has a HIPAA Business Associate Agreement with that GenAI LLM. Customer should review the GenAI LLM terms of use and associated privacy statements with respect to ePHI processing by that GenAI LLM, and any HIPAA restrictions by that GenAI LLM.

Google Gemini

- https://cloud.google.com/terms/service-terms
- https://ai.google.dev/gemini-api/terms
- https://ai.google.dev/gemini-api/docs/abuse-monitoring
- https://policies.google.com/privacy
- https://cloud.google.com/trust-center/?hl=en
- https://cloud.google.com/terms/generative-ai-indemnified-services?hl=en

Google does not use Input (including associated system instructions, cached content, and files such as images, videos, or documents) or Output generated to train its models. Google may use any content (e.g., text, images, videos, audio, or software) submitted through Google's APIs or Optimizely's websites and applications to provide, secure, and improve the Google APIs and related service. This use does not override the restriction in relation to Input and Output. However, some content outside of input and output could fall under this provision. Google processes Personal Data in accordance with applicable law: (a) to provide the Services and any related technical support; (b) as further specified via Optimizely's use of the Services (including in the settings and other functionality of the Services) and any related technical support; and (c) as further documented in any other written instructions given by Optimizely and acknowledged by Google. Google processes personal data included in content (outside of input and output) for any permitted purpose described in its privacy policy, including to provide, secure, and improve the Google APIs (and the related service(s)). Such processing is also governed by Google's Privacy Policy. Google does not sell personal data subject to the CCPA to third parties.

OpenAI and DALL-E policies[1]

- https://openai.com/policies/service-terms/
- https://openai.com/policies/terms-of-use/
- https://openai.com/policies/sharing-publication-policy/
- https://openai.com/policies/usage-policies/
- https://openai.com/enterprise-privacy/

Open AI does not use Input (including associated system instructions, cached content, and files such as images, videos, or documents) or Output generated to train its models. Open AI may otherwise use Content to provide, maintain, develop, and improve its services, comply with applicable law, enforce its terms and policies, and keep its services safe. If a Customer does not want Open AI to use its Content to train its models, Customers can opt out by following the instructions in Open AI Data Use Policy. Open AI offers API customers a way to opt-in to share data with Open AI, such as by providing feedback in the Playground, which Open AI then uses to improve its models. Unless they explicitly opt-in, organizations are opted out of data-sharing by default. Please review to Open AI's enterprise privacy policy https://openai.com/enterprise-privacy/.

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DISCLOSURE AND SAFE HARBOR

ANY FUTURE FEATURES MENTIONED IN THIS SERVICES DESCRIPTION IS INTENDED TO OUTLINE OPTIMIZELY'S GENERAL PRODUCT DIRECTION. IT IS INTENDED FOR INFORMATION PURPOSES ONLY. IT IS NOT INCORPORATED INTO ANY SOFTWARE SUBSCRIPTION AGREEMENT. IT IS NOT A COMMITMENT TO DELIVER ANY MATERIAL, CODE, OR FUNCTIONALITY, AND SHOULD NOT BE RELIED UPON IN MAKING PURCHASING DECISIONS. CUSTOMERS WHO PURCHASE OPTIMIZELY'S SOFTWARE SERVICES SHOULD MAKE THEIR PURCHASE DECISIONS BASED UPON FEATURES AND FUNCTIONS THAT ARE CURRENTLY AVAILABLE. ANY UNRELEASED SERVICES, FEATURES, FUNCTIONALITY, OR ENHANCEMENTS REFERENCED IN ANY DOCUMENT, ROADMAP, BLOG, WEBSITE, PRESS RELEASE, OR PUBLIC STATEMENT THAT ARE NOT CURRENTLY AVAILABLE ARE SUBJECT TO CHANGE AT OUR DISCRETION AND MAY NOT BE DELIVERED AS PLANNED OR AT ALL. THE DEVELOPMENT, RELEASE, AND TIMING OF ANY FEATURES OR FUNCTIONALITY REMAINS AT THE SOLE DISCRETION OF OPTIMIZELY.

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[1] Optimizely's current plan is to transition away from OpenAI and DALL-E.

Optimizely Content Management System (PaaS)

General Overview

Content Management System (CMS) includes a multi-lingual enterprise search and 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 Hosting Region that can be deployed across several Environments for various deployment stages.

Functionalities, Capabilities and Features

The functionality and capabilities of the Subscription may vary depending on whether the Features are part of the Subscription, and/or have otherwise been activated or de-activated by the Customer

Features include, amongst others as described in the Documentation -

- Authoring and layout
- Headless site configuration
- Continuous releases
- Graph integration
- Multiple website management
- Visual editing
- Multi-language management
- Template management
- Multi-step workflows
- Application management

HIPAA ePHI enabled

As from 1 January 2025, CMS (PaaS) is available for a new Subscription as an ePHI-enabled Software Service. A Business Associate Agreement ('BAA') is required before Customer may process any ePHI in ePHI-enabled Software Service. Optimizely may suspend ePHI processing until a BAA has been executed by Optimizely and the Covered Entity.

AI features

Optimizely Opal features

See Optimizely Opal for a full list.

Prerequisite Optimizely Software Service

Not applicable.

APIs

- Content Definitions API – Lets system integrators and external clients remotely manage definitions (such as content types, property groups, and property data types) without deploying code to the Optimizely application or using the admin user interface.

- Content Delivery API – Lets Customers use CMS in a headless mode by providing the ability to use built-in C# Razor helpers to render pages and blocks on a website, making content accessible through REST APIs for display on multiple devices and across multiple channels.
- Content Management API – Lets Customers complete basic content management operations such as create content objects, modify existing content objects, delete content objects, get draft content objects, and move content objects.

Optimizely Options and Add-ons

- **CMS Platform Plus[2]** – Optional add-on for businesses with mission critical applications that value high availability, security, and performance. For example, banks, hospitals, and commerce businesses where service interruption or slowness is not acceptable.
    - Premium service bus for higher performance, especially with frequent high-traffic campaigns
    - Regional redundancy
    - Zone redundancy
    - 99.9% SLA[3]
- **Frontend Hosting** – Optional add-on for headless implementations to push code using APIs and deploy Customer's website head with minimal down time. Includes Optimizely Graph, a content delivery network (CDN), web application firewall (WAF), and managed infrastructure services.
    - Next.js framework support
    - Code package deployment and troubleshooting via logs and developer portal
    - Server-side rendering (SSR) and static site generator (SSG) support
    - Environment variables management
    - Optimized global network delivery and edge caching of static assets
    - Managed WAF
    - Basic Denial of Service (DDoS) mitigation
    - Ensuring the infrastructure that supports the container is up and running and reachable is Optimizely's responsibility, anything in the contents of the container itself is the customer's responsibility to manage and troubleshoot. Details on frontend hosting are available upon request from Optimizely Support (support@optimizely.com).
- **Commerce Connect** – Adds catalog management and the following optional capabilities: cart, pricing, transactions, order management, and promotions.
- **Graph** – A Digital Experience Platform service that provides two major applications.
    - **Content search** – A more efficient and highly customizable search experience, or building dynamic content blocks by querying data and shaping as needed.
    - **Headless content delivery** – Enables cross-application and cross-framework delivery of content by returning CMS data as a JSON object.
- **Search & Navigation** – A search optimization option that lets Customers add automatic landing pages, adaptive navigation, and guided search. When paired with Optimizely Recommendations, Search & Navigation can personalize search results.
- **Forms** – Lets Customers create built-in multi-step forms such as event registrations, job applications, customers surveys, and more.
- Community API – A collection of extensible services for defining and collecting community-generated content.

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[2] CMS Platform Plus does not support hosting in Norway East, UAE North, and Sweden Central. See Optimizely Hosting Regions.

[3] 99.95% SLA when paired with Premium Support Services.

- Digital Asset Management (DAM)[4] – Use DAM to manage, discover, and reuse digital assets.
  - Centralized storage of digital assets
  - Multi-format support
  - Batch uploading and labelling
  - Brand templates
  - Asset collections
  - Asset expiry and lineage
- Optimizely Connect Platform[5] – Lets Customers host Opal tools and develop integration apps or data syncs between Third-Party solutions and approved Optimizely Software Service.

Integrations to Other Optimizely Software Service

(With URL links to other relevant Documentation)

- **Content Recommendations** – Automatically generates topic interests based on Customer's site content and Visitors' browsing behavior. When paired with Search & Navigation, Search and Navigation can rank search results considering an individual's activity across the customer's touchpoints, such as browsing and purchases.
- Content Marketing Platform – Use tasks and workflows in CMP to manage the content production lifecycle of CMS pages.
- Configured Commerce – Customers in manufacturing and distribution can begin selling products using Configured Commerce out-of-the-box ecommerce functionality.
- Optimizely Data Platform – Enables Users to harmonize their Customer Data from CMS and Third-Party applications and/or Third-Party platforms to understand their Customer Data through insights, observations, and predictions generated via Artificial Intelligence (AI) and Machine Learning (ML). Users can act on that data by building filters and audiences to target across Optimizely Software Service or via integrations to Third-Party channels of their choosing.
  - **CDP Audience Sync via ODP** – Customers can purchase the CDP Audience Sync version of ODP to exclusively enable Real-time Audiences in CMS, and Optimizely will provide a limited ODP instance configured to work with the Customer's existing CDP. Customers will have limited-to-no access to the ODP User Interface (UI) or other functionality, other than essential views determined by the Optimizely Onboarding team to ensure that Real-time Audiences can be used in conjunction with CMS.

Third-Party Software and Platform Integrations

Optimizely App Directory – Apps and integrations made available by Optimizely and maintained by Optimizely or third-parties may increase productivity and the streamlining of processes:

- **Third-Party MarTech and Back-office Connectors** – Apps that exchange data between Optimizely and Third-Party systems or let Third-Party systems operate within the Optimizely environment, on the presentation or application, or data tiers.
- **Presentation Layer Apps** – Apps that add JavaScript or tags to the HTML presentation layer of Optimizely CMS and Commerce Connect websites.

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[4] **Digital Asset Management (DAM) is not HIPAA enabled**.

[5] **Optimizely Connect Platform is not HIPAA enabled.**

- **Embedded Apps** – Apps that add capabilities to the Optimizely editor UI or enhance existing capabilities within the platform.

Included services

The following services are included in this Software Service.

- Onboarding
    - o Onboarding is described in the applicable Onboarding Documentation.
    - o Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – [Support Policy](#).

Optimizely Commerce Connect

General Overview

Commerce Connect provides catalog management, cart, pricing, transactions, order management, and promotion capabilities for Content Management System (PaaS). The service varies by various usage parameters and includes at least one Service Instance serving one codebase in one Hosting Region that can be deployed across several Environments for various deployment stages.

Functionalities, Capabilities and Features

The functionality and capabilities of the Subscription may vary depending on whether the Features are part of the Subscription, and/or have otherwise been activated or de-activated by the Customer

Features include, amongst others as described in the Documentation -

- Catalog management

- Cart, checkout, and order management

- Customer management

- Marketing campaigns and discounts

- Content management

- Business administration and reports

AI features

Optimizely Opal features

See Optimizely Opal for a full list.

AI and machine-learning features

- Generate text for a product property (powered by GPT 3.5). You must submit an access request to Optimizely to enable the feature.

Prerequisite Optimizely Software Service

- **Content Management System (PaaS)** – Content Management System (CMS) includes a multi-lingual enterprise search and navigation engine, a delivery network, web application firewall, and managed services.

APIs

Not applicable.

Optimizely Options and Add-ons

- **Graph** – A Digital Experience Platform service that provides two major applications.
  - **Frontend and backend content search** – A more efficient and highly customizable search experience, or building dynamic content blocks by querying data and shaping as needed.
  - **Headless content delivery** – Enables cross-application and cross-framework delivery of content by returning CMS data as a JSON object.

- **Search & Navigation** – A search optimization option that lets Customers add automatic landing pages, adaptive navigation, and guided search. When paired with Optimizely Recommendations, Search & Navigation can personalize search results.
- Community API – A collection of extensible services for defining and collecting community-generated content.

Integrations to Other Optimizely Software Service

(With URL links to other relevant Documentation)

- **Product Recommendations** – Lets the Customer display suitable product recommendations via the native integration package or custom implements towards the Product Recommendations Service API. Features include omni-channel tracking into the Recommendations Engine.
- Digital Asset Management – Lets editors select and link resources from Optimizely DAM.
- Optimizely Data Platform – Enables Users to harmonize their Customer Data from CMS and Third-Party applications and/or Third-Party platforms to understand their Customer Data through insights, observations, and predictions generated via Artificial Intelligence (AI) and Machine Learning (ML). Users can act on that data by building filters and audiences to target across Optimizely Software Service or via integrations to Third-Party channels of their choosing.
  - o **CDP Audience Sync via ODP** – Customers can purchase the CDP Audience Sync version of ODP to exclusively enable Real-time Audiences in Commerce Connect, and Optimizely will provide a limited ODP instance configured to work with the Customer's existing CDP. Customers will have limited-to-no access to the ODP User Interface (UI) or other functionality, other than essential views determined by the Optimizely Onboarding team to ensure that Real-time Audiences can be used in conjunction with Commerce Connect.

Third-Party Software and Platform Integrations

- Bolt – Use Bolt as the default payment provider.
- Payment Service – Enable Payment Service to add one or more payment gateway providers for your ecommerce.
- Optimizely App Directory - Apps and integrations made available by Optimizely and maintained by Optimizely or third-parties may assist with productivity and the streamlining of processes:
  - o **Third-Party MarTech and Back-office Connectors** – Apps that exchange data between Optimizely and Third-Party systems or let Third-Party systems operate within the Optimizely environment, on the presentation or application, or data tiers.
  - o **Presentation Layer Apps** – Apps that add JavaScript or tags to the HTML presentation layer of Optimizely CMS and Commerce Connect websites.
  - o **Embedded Apps** – Apps that add capabilities to the Optimizely editor UI or enhance existing capabilities within the platform.

Included services

The following services are included in this Software Service.

- Onboarding
  - o Onboarding is described in the applicable Onboarding Documentation.
  - o Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – Support Policy.

Optimizely Content Management System (SaaS)

General Overview

CMS (SaaS) is a fully managed multi-lingual enterprise CMS with search capabilities, Visual Builder, a GraphQL-based delivery API, and a REST management API. It is the fully managed version of the Optimizely Content Management System (CMS) that is always up to date and scalable, with first-class technology-agnostic APIs. The service varies by various usage parameters and includes a Service Instance with generally one Production Environment and two Test Environments in one Hosting Region.

Functionalities, Capabilities and Features

The functionality and capabilities of the Subscription may vary depending on whether the Features are part of the Subscription, and/or have otherwise been activated or de-activated by the Customer

Features include, amongst others as described in the Documentation -

- Headless site configuration
- Continuous releases
- Visual Builder and content variation support
- Forms builder
- Graph integration
- Multiple website management
- Hosting through Vercel or Netlify, subject to any applicable Vercel or Netlify terms of use
- Hosting through Optimizely
- Visual editing
- Multi-language management
- Interactive preview
- Customer elements
- Template management
- Multi-step workflows
- Application management
- Content management

HIPAA ePHI enabled

As from 1 January 2025, CMS (SaaS) is available for a new Subscription as an ePHI-enabled Software Service. A Business Associate Agreement ('BAA') is required before Customer may process any ePHI in ePHI-enabled Software Service. Optimizely may suspend ePHI processing until a BAA has been executed by Optimizely and the Covered Entity.

AI features

Optimizely Opal features

See Optimizely Opal for a full list.

Prerequisite Optimizely Software Service

- **CDP Audience Sync** – Customers can sync audiences built into their own CDP to Optimizely for targeting with CMS (SaaS). Customers will have limited-to-no access to the ODP user interface or other functionality, other than essential views determined by Optimizely to ensure that Real-time Audiences can be successfully used with additional Optimizely Software Service.

APIs

- CMS (SaaS) APIs

Optimizely Options and Add-Ons

- **Graph** – Included as part of CMS (SaaS) service. Graph lets developers create custom search tools that transform user input into a GraphQL query and then process the results in a search results page. It also enables headless content delivery.
- Digital Asset Management (DAM)[6] – Use DAM to manage, discover, and reuse digital assets.
    - Centralized storage of digital assets
    - Multi-format support
    - Batch uploading and labelling
    - Brand templates
    - Asset collections
    - Asset expiry and lineage
- **Frontend Hosting** – Optional add-on for headless implementations to push code using APIs and deploy Customer's website head with minimal down time. Includes Optimizely Graph, a content delivery network (CDN), web application firewall (WAF), and managed infrastructure services.
    - Next.js framework support
    - Code package deployment and troubleshooting via logs and developer portal
    - Server-side rendering (SSR) and static site generator (SSG) support
    - Environment variables management
    - Optimized global network delivery and edge caching of static assets
    - Managed WAF
    - Basic Denial of Service (DDoS) mitigation
    - Ensuring the infrastructure that supports the container is up and running and reachable is Optimizely's responsibility, anything in the contents of the container itself is the customer's responsibility to manage and troubleshoot. Details on frontend hosting are available upon request from Optimizely Support (support@optimizely.com).
- Optimizely Connect Platform[7] – Lets Customers host Opal tools and develop integration apps or data syncs between Third-Party solutions and approved Optimizely Software Service.

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[6] **Digital Asset Management (DAM) is not HIPAA enabled.**

[7] **Optimizely Connect Platform is not HIPAA enabled.**

Integrations to Other Optimizely Software Service

(With URL links to other relevant Documentation)

- **Content Recommendations** – Uses visitor behavior combined with applied machine learning and statistical analysis to autonomously create and optimize individual content recommendations that can be retrieved either via the native integration package or using bespoke implementations towards the Service APIs.
- Optimizely Data Platform – Enables Users to harmonize their Customer Data from CMS and Third-Party applications and/or Third-Party platforms to understand their Customer Data through insights, observations, and predictions generated via Artificial Intelligence (AI) and Machine Learning (ML). Users can act on that data by building filters and audiences to target across Optimizely Software Service or via integrations to Third-Party channels of their choosing.
    - **CDP Audience Sync via ODP** – Customers can purchase the CDP Audience Sync version of ODP to exclusively enable Real-time Audiences in CMS, and Optimizely will provide a limited ODP instance configured to work with the Customer's existing CDP. Customers will have limited-to-no access to the ODP User Interface (UI) or other functionality, other than essential views determined by the Optimizely Onboarding team to ensure that Real-time Audiences can be used in conjunction with CMS.
- **Web Experimentation** – Lets Users test website experiences they delivery through Customer properties.

Third-Party Software and Platform Integrations

Vercel (https://vercel.com) and Netlify (https://www.netlify.com) offer Third-Party front-end hosting platforms for Customers to store the applications they are building and publishing these applications to production. Customer data is exchanged between CMS and Vercel/Netlify via Optimizely's GraphQL API. Vercel and Netlify are Optimizely Sub-processors. Customer use of Vercel of Netlify are subject to any applicable Vercel of Netlify terms of use.

Included services

The following services are included in this Software Service.

- Onboarding
    - Onboarding is described in the applicable Onboarding Documentation.
    - Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – Support Policy.

Optimizely Content Marketing Platform

General Overview

Content Marketing Platform (CMP) lets teams share plans, collaborate on assets and execute campaigns. CMP lets Customers see the work their marketing organization is doing, including the entire content workflow—from brief to finalized content.

Functionalities, Capabilities and Features

The functionality and capabilities of the Subscription may vary depending on whether the Features are part of the Subscription, and/or have otherwise been activated or de-activated by the Customer.

Optimizely Content Marketing Platform. Features include, amongst others as described in the Documentation -

- • Task management
- • Task templates
- • Campaign management
- • Campaign templates
- • Workflow management
- • Content management
- • Idea lab
- • Omni-channel authoring
- • Multi-channel publishing
- • Security and user management
- • Analytics and user activity logs
- • Efficiency dashboard

Optimizely Digital Asset Management[8]. Features include, amongst others as described in the Documentation –

- • Centralized storage of digital assets
- • Multi-format support
- • Batch uploading and labelling
- • Brand templates
- • Asset collections
- • Asset expiry and lineage

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[8] **Digital Asset Management (DAM) is not HIPAA enabled.**

Service Descriptions: Optimizely Software Service

Optimizely Confidential Information

AI features

Optimizely Opal features

See Optimizely Opal for a full list.

AI and machine-learning features

Content Marketing Platform

For Customers on Opti ID, Administrators can turn off all Optimizely Opal and AI features from Admin Center > Settings > Generative AI. For Customers not on Opti ID, Administrators can toggle all generative AI features on or off for all users of an instance from the avatar > Opal & AI.

- Bring your own AI (BYOAI) to deploy your own LLM models or AI engines to generate content and determine what powers co-pilot chat (supports Writer and Jasper).
- Generate AI images for a task (powered by DALL-E).
- Ask AI[9] to write marketing plans and suggest meta-descriptions, keywords, and so on.

Digital Asset Management (DAM) add-on

- Automatically suggests tags for uploaded images based on machine-learning algorithms (powered by AWS Rekognition).
- Generate cropped variations of images in the library using an automatic smart focal point (powered by AWS Rekognition).

Prerequisite Optimizely Software Service

Not applicable.

APIs

https://docs.developers.optimizely.com/content-marketing-platform/reference/api-reference

Optimizely Options and Add-Ons

- Optimizely Connect Platform – Lets Customers develop integration apps or data syncs between Third-Party solutions and approved Optimizely Software Service.

Integrations to Other Optimizely Software Service

(With URL links to other relevant Documentation)

- Content Management System (PaaS) – Manage the content production lifecycle of CMS pages using tasks and workflows in CMP.
- Optimizely Connect Platform[10] – Lets Customers host Opal tools and develop integration apps or data syncs between Third-Party solutions and approved Optimizely Software Service.

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[9] For only customers who are not on Opti ID.

[10] Optimizely Connect Platform is not HIPAA enabled.

Availability with other Optimizely Software Service

- Digital Asset Management:
    - Content Management System (PaaS)
    - Content Management System (SaaS)

Third-Party Software and Platform Integrations

Third-Party integrations – Apps and integrations made available maintained by Optimizely and third-parties that may assist with productivity and the streamlining of processes.

Included services

The following services are included in this Software Service.

- Onboarding
    - Onboarding is described in the applicable Onboarding Documentation.
    - Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – Support Policy.

Optimizely Graph

General Overview

Graph transforms content into a form that Users can query, similar to how a search engine crawls the web to build a graph-based index of content. Customers can sync content into Graph by configuring triggers and scheduling options that determine when data will sync content between their site and Graph. Graph provides the following major applications:

- **Content search** – Create custom search tools that transform user input into a GraphQL query and then process the results into a search results page. Extend the logic behind these queries to enable highly customizable search experiences.
- **Content delivery** – Build dynamic content blocks by querying data and shape as needed.
- **Headless content delivery** – Enables cross-application and cross-framework delivery of content by returning data as a JSON object.

Functionalities, Capabilities and Features

The functionality and capabilities of the Subscription may vary depending on whether the Features are part of the Subscription, and/or have otherwise been activated or de-activated by the Customer

Features include, amongst others as described in the Documentation -

- Index any data source

- AI-powered semantic search

AI features

AI and machine-learning features

- Enable semantic search to return similar vocabulary results.

Prerequisite Optimizely Software Service

- **Content Management System (PaaS) and Commerce Connect** – Graph can be provisioned within the PaaS Portal. Once activated, you can install and deploy the required CMS Package for your site.
- **Content Management System (SaaS)** – Use the access key in the CMS (SaaS) Dashboard to query the GraphQL service and begin building Graph-based solutions.

APIs

Not applicable.

Optimizely Options and Add-Ons

- Optimizely Connect Platform[11] – Lets Customers host Opal tools and develop integration apps or data syncs between Third-Party solutions and approved Optimizely Software Service.

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[11] **Optimizely Connect Platform is not HIPAA enabled.**

Integrations to Other Optimizely Software Service

Not applicable.

Third-Party Software and Platform Integrations

Not applicable.

Included services

The following services are included in this Software Service.

- Onboarding
    - o   Onboarding is described in the applicable Onboarding Documentation.
    - o   Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – Support Policy.

Optimizely Experimentation

General Overview

- **Web Experimentation** – Helps Customers test website experience they deliver through Customer properties. Customers must install the applicable Optimizely snippet on licensed Customer Properties, then use the editing and configuration tools of the Software Service to select content to test and configure test parameters.
- **Feature Experimentation** – Gives Customers the ability to create feature flags and run experiments anywhere within the Customer Property technology stack. Customers must install the applicable Optimizely X software development kit (e.g., the 'Optimizely Feature Experimentation SDK') within its Customer Property technology stack, then they can begin to track events and view results in Feature Experimentation.

Functionalities, Capabilities and Features

The functionality and capabilities of the Subscription may vary depending on whether the Features are part of the Subscription, and/or have otherwise been activated or de-activated by the Customer

Web Experimentation. Lets the Customer build and launch various experiments within the context of the browser. Features include, amongst others as described other published Documentation for Experimentation-

- Visual experiment editor

- Automated experiment results analysis

- Experiment targeting options

- Audience builder

- Security and administrative control

- Omni-channel event tracking capabilities

- Third-Party analytics and audience integrations

- Experiment preview mode

- Edge delivery

- Reporting

Feature Experimentation. Lets the Customer control their application using feature flags and run experiments across all implemented channels. Features include, amongst others as described other published Documentation for Experimentation-

- Access to SDKs for >12 programming languages

- User interface to configure feature flags, feature variables, rollouts, and experiments

- Attribute targeting capabilities

- Configuration of arbitrary development environments

- Automated results analysis

- Security and administrative control

- Audience builder

- Omni-channel event tracking capabilities

- Webhooks

- Reporting

HIPAA ePHI enabled

As from 1 January 2025, Experimentation is available for a new Subscription as an ePHI-enabled Software Service. A Business Associate Agreement ('BAA') is required before Customer may process any ePHI in ePHI-enabled Software Service. Optimizely may suspend ePHI processing until a BAA has been executed by Optimizely and the Covered Entity.

AI features

Optimizely Opal features

Feature Experimentation

See [Optimizely Opal](#) for a full list.

Web Experimentation

See [Optimizely Opal](#) for a full list.

AI and machine-learning features

Feature Experimentation

- [Uses Stats Engine](#) algorithms to reduce errors and get faster experiment results.
- [Uses Stats Accelerator](#) machine-learning algorithms to manipulate traffic distribution and minimize time to statistical significance.
- [Uses a multi-arm bandit (MAB)](#) intelligent algorithm to identify top-performing variations and funnel more visitors to the best-performing variation to drive higher conversions.

Web Experimentation

- [Use Stats Engine](#) algorithms to reduce errors and get faster experiment results.
- [Use Stats Accelerator](#) machine-learning algorithms to manipulate traffic distribution and minimize time to statistical significance.
- [Use a multi-arm bandit (MAB)](#) intelligent algorithm to identify top-performing variations and funnel more visitors to the best-performing variation to drive higher conversions.
- Create a predicted intent audience condition using [adaptive audiences](#) that capture a percentage of your visitors most interested in a specific topic.
- [Use contextual bandits](#) to deliver personalized variations to each user by dynamically re-allocating traffic based on the primary metric and user attributes.

Collaboration add-on

For Customers on Opti ID, Administrators can turn off all Optimizely Opal and AI features from [Admin Center > Settings > Generative AI](#). For Customers not on Opti ID, Administrators can toggle all generative AI features on or off for all users of an instance from [the avatar > Opal & AI tab](#).

- [Bring your own AI (BYOAI)](#) to deploy your own LLM models or AI engines to generate content and determine what powers co-pilot chat (supports Writer and Jasper).

Prerequisite Optimizely Software Service

- CDP Audience Sync – Customers can sync audiences built into their own CDP to Optimizely for targeting with Web Experimentation, Feature Experimentation, and CMS. Customers may purchase the CDP Audience Sync version of ODP exclusively for enabling Real-time Audiences in other Optimizely Software Service. Customers will have limited-to-no access to the ODP user interface or other functionality, other than essential views determined by Optimizely to ensure that Real-time Audiences can be successfully used with additional Optimizely Software Service.

APIs

- Web Experimentation APIs
- Feature Experimentation APIs
- Experimentation Data API

Optimizely Options and Add-Ons

- **Warehouse-Native Experimentation Analytics** – Teams can analyze experiment performance, identify winning variations, and conduct deeper analyses on experiments within Warehouse-Native Experimentation Analytics that ensures data security and privacy, and avoids data duplication or movement. Capabilities include:
  o Integrate Snowflake, Databricks, Google BigQuery, or Amazon Redshift data warehouse
  o Mirror tables and views from the data warehouse as logical datasets denoting related business entities
  o Metric builder interface lets users build metrics with selectively exposed data warehouse data
  o Run Experimentation stats engine on top of warehouse-native data to return statistical significance and confidence intervals
  o Create an Experiment scorecard that provides a structured way to compare experiment variations against any business metric stored in your data warehouse
  o Use controlled-experiment using pre-experiment data (CUPED) to reduce the impact of random variation and surface insights quicker
- **Collaboration** – Lets the Customer manage their experiment ideation, planning, and hypothesis-creation process. Capabilities included when Customer is using an eligible tier (among others):
  o Workflow management and approvals
    ▪ Create workflows and codify the experimentation process
    ▪ Assign approvers to have confidence that all experiments are well-designed
  o Test planning and collaboration
    ▪ Document test design parameters using a structured template
    ▪ Embed design files from Figma and InVision and directly annotate on screenshots
  o Project orchestration
    ▪ Track workflow steps in the design, build, and launch of an experiment
    ▪ Orchestrate the program easily using the calendar, timeline, and board views
    ▪ Customize and save these views to share with other stakeholders
- **Digital Asset Management (DAM)**[12] – When Web Experimentation is used with an Optimizely Software Service that contains DAM functionality, the Customer can access DAM assets directly within Web Experimentation. Use DAM to manage, discover, and reuse digital assets in one central repository.

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[12] **Digital Asset Management (DAM) is not HIPAA enabled.**

Integrations to Other Optimizely Software Service

(With URL links to other relevant Documentation)

- [Real-time Audiences for Web Experimentation](#) – Lets Customers expand their audience targeting capabilities by using real-time audiences from ODP audiences (via ODP or CDP Audience Sync) in their Web Experimentation experiments.
- [Real-time Audiences for Feature Experimentation](#) – Lets Customers expand their audience targeting capabilities by using real-time audiences from ODP audiences (via ODP or CDP Audience Sync) in their Feature Experimentation experiments.

Third-Party Software and Platform Integrations

Apps and integrations maintained by Optimizely and third-parties that may assist with productivity and the streamlining of processes.

- [Web Experimentation Third-Party integrations](#)
- [Feature Experimentation Third-Party integrations](#)

Included services

The following services are included in this Software Service.

- Onboarding
  - Onboarding is described in the applicable Onboarding Documentation.
  - Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – [Support Policy](#).

Optimizely Personalization

General Overview

Personalization is an Optimizely Software Service designed to help Customers personalize the experiences they deliver through their Customer Properties. To use this Software Service, the Customer first installs the applicable Optimizely Snippet on licensed Customer Properties, then uses the editing and configuration tools of the Software Service to select Content to test and to configure personalization campaign parameters. Optimizely Personalization uses Visitor Data and other Customer Data to determine what Content variations to display to Visitors. Personalization is designed to help Customers gain actionable insights on the personalization of their Content. Personalization may be stopped at any time, in which case the Content variations will no longer be displayed to Visitors.

Functionalities, Capabilities and Features

The functionality and capabilities of the Subscription may vary depending on whether the Features are part of the Subscription, and/or have otherwise been activated or de-activated by the Customer

Features include, amongst others as described in the Documentation -

- Visual campaign editor
- Automated campaign results analysis
- Targeting options (including behavioral targeting)
- Contextual bandits
- Security and administrative control
- Audience builder
- Omni-channel event tracking capabilities
- Third-Party analytics and audience integrations
- Campaign preview mode
- Edge delivery
- Reporting

AI features

Optimizely Opal features

See Optimizely Opal for a full list.

AI and Machine-learning features

- Use Stats Engine algorithms to reduce errors and get faster experiment results.
- Use a multi-arm bandit (MAB) intelligent algorithm to identify top-performing variations and funnel more visitors to the best-performing variation to drive higher conversions.
- Create a predicted intent audience condition using adaptive audiences that capture a percentage of your visitors most interested in a specific topic.

Collaboration add-on

For Customers on Opti ID, Administrators can turn off all Optimizely Opal and AI features from Admin Center > Settings > Generative AI. For Customers not on Opti ID, Administrators can toggle all generative AI features on or off for all users of an instance from the avatar > Opal & AI tab.

- Bring your own AI (BYOAI) to deploy your own LLM models or AI engines to generate content and determine what powers co-pilot chat (supports Writer and Jasper).

Prerequisite Optimizely Software Service

Not applicable.

APIs

Not applicable.

Optimizely Options and Add-Ons

- **Collaboration** – Lets the Customer manage their experiment ideation, planning, and hypothesis-creation process for optimizing personalized experiences. Capabilities included when Customer is using an eligible tier:
  - Workflow management and approvals
    - o Create workflows and codify the optimization process
    - o Assign approvers to have confidence that all experiments are well-designed
  - Test planning and collaboration
    - o Document test design parameters using a structured template
    - o Embed design files from Figma and InVision and directly annotate on screenshots
  - Project orchestration
    - o Track workflow steps in the design, build, and launch of an experiment
    - o Orchestrate the program easily using the calendar, timeline, and board views
    - o Customize and save these views to share with other stakeholders
- **Digital Asset Management (DAM)**[13] – When Personalization is used with an Optimizely Software Service that contains DAM functionality, the Customer can access DAM assets directly within Personalization. Use DAM to manage, discover, and reuse digital assets in one central repository.

Integrations to Other Optimizely Software Service

Not applicable.

Third-Party Software and Platform Integrations

Not applicable.

Included services

The following services are included in this Software Service.

- Onboarding

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[13] **Digital Asset Management is not HIPAA enabled.**

- - Onboarding is described in the applicable Onboarding Documentation.
  - Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – [Support Policy](link).

Optimizely Analytics

General Overview

Optimizely's Analytics enables Customers to use their data warehouse as the source of truth, combining event-based and state-based data from various systems to define and analyze metrics critical to the success of their business, such as experimentation, product, web, and customer journey analytics.

Functionalities, Capabilities and Features

The functionality and capabilities of the Subscription may vary depending on whether the Features are part of the Subscription, and/or have otherwise been activated or de-activated by the Customer Features include, amongst others as described in the Documentation -

- Integrate Snowflake, Databricks, Google BigQuery, or Amazon Redshift data warehouse.

- Mirror tables and views from the data warehouse as logical datasets denoting related business entities.

- Metric Builder interface lets users build metrics with selectively exposed data warehouse data.

- Exploration templates support detailed journey analyses, funnel analyses, ad hoc aggregations with slice and dice capabilities.

- Powerful dashboards with parametrization capabilities, custom visualizations, and flexible layouts.

AI features

Optimizely Opal features

See Optimizely Opal for a full list.

Prerequisite Optimizely Software Service

Not applicable.

APIs

Not applicable.

Optimizely Options and Add-Ons

Not applicable.

Integrations to Other Optimizely Software Service

(With URL links to other relevant Documentation)

- Web Experimentation – Teams can use Warehouse-Native Experimentation Analytics to analyze experiment performance, identify winning variations, and conduct deeper analyses on experiments that ensures data security and privacy, and avoids data duplication or movement.
    - Run Experimentation stats engine on top of warehouse-native data to return statistical significance and confidence intervals
    - Create an Experiment scorecard that provides a structured way to compare experiment variations against any business metric stored in your data warehouse

- **Feature Experimentation** – Teams can use Warehouse-Native Experimentation Analytics to analyze experiment performance, identify winning variations, and conduct deeper analyses on experiments that ensures data security and privacy, and avoids data duplication or movement.
  - o Run Experimentation stats engine on top of warehouse-native data to return statistical significance and confidence intervals
  - o Create an Experiment scorecard that provides a structured way to compare experiment variations against any business metric stored in your data warehouse

Third-Party Software and Platform Integrations

Apps and integrations offered by Optimizely for Third-Party integrations that may assist with productivity and the streamlining of processes.

- Snowflake

- BigQuery

- Redshift

- Databricks

Included services

The following services are included in this Software Service.

- Onboarding
  - o Onboarding is described in the applicable Onboarding Documentation.
  - o Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – Support Policy.

Optimizely Data Platform

General Overview

Optimizely's Data Platform (ODP) lets Users harmonize their Customer Data from any system or tool via integrations or APIs to build a 360-degree view of their customers. Users can view profiles, identifiers, consent/reachability, and events data in the service, collected across all channels, systems, and tools including but not limited to: online, mobile, and email. The data can be enriched by data from other channels such as in-store and call center.

Users can understand their Customer Data through insights, observations, and predictions generated via Artificial Intelligence (AI) and Machine Learning (ML). Users can get additional understanding via product catalog insights, observations, and predictions.

Functionalities, Capabilities and Features

The functionality and capabilities of the Subscription may vary depending on whether the Features are part of the Subscription, and/or have otherwise been activated or de-activated by the Customer

Features include, amongst others as described in the Documentation -

- Event tracking via web SDK, mobile SDK, or Rest APIs

- Historical data

- Ability to query event data via REST APIs or GraphQL

- Aggregated profiles

- Customer identity stitching and resolution

- Ability to view customer data

- Standard and Real-time audience segmentation options

- CDP Audience Sync

- ODP predictions

- Reporting

- Integrations via the Connect Platform

AI features

Optimizely Opal features

See Optimizely Opal for a full list.

AI and machine-learning features

- Reduce churn using ODP's customer win-back model, which shows the relationship between days since engagement and the likelihood of remaining your customer.
- Use the Predicted Time Until Next Order report to evaluate customer data from the last 180 days to predict a customer's likelihood to order in the next 42 days. This report uses the Order Likelihood and Days Until Next Order modeled attributes.

Prerequisite Optimizely Software Service

Not applicable.

APIs

https://docs.developers.optimizely.com/optimizely-data-platform/reference/introduction

Optimizely Options and Add-Ons

- CDP Audience Sync – Customers can sync audiences built into their own CDP to Optimizely for targeting with Web Experimentation, Feature Experimentation, and CMS. Customers may purchase the CDP Audience Sync version of ODP exclusively for enabling Real-time Audiences in other Optimizely Software Service. Customers will have limited-to-no access to the ODP user interface or other functionality, other than essential views determined by Optimizely to ensure that Real-time Audiences can be successfully used with additional Optimizely Software Service.
- **Product Recommendations** – Lets the Customer display suitable product recommendations via the native integration package or custom implements towards the Product Recommendations Service API. Features include omni-channel tracking into the Recommendations Engine.

Integrations to Other Optimizely Software Service

(With URL links to other relevant Documentation)

- Content Recommendations – Use the integration to automatically generate topic interests based on Customer's site content and Visitors' browsing behavior. Optionally use AI to generate additional topics of interest based on those populated by Content Recommendations.
- Content Management System (PaaS) – Lets Customers track how Visitors interact with their web content, segment Visitors, and make data-driven decisions about topics that Visitors find most engaging.
- Commerce Connect 14 – Export data from Commerce Connect such as orders, customers, and products.
- Commerce Connect 13 – Export data from Commerce Connect such as orders, customers, and products.
- Real-time Audiences for Web Experimentation – Lets Customers expand their audience targeting capabilities by using real-time audiences from ODP audiences in their Web Experimentation experiments.
- Real-time Audiences for Feature Experimentation – Lets Customers expand their audience targeting capabilities by using real-time audiences from ODP audiences in their Feature Experimentation experiments.

Third-Party Software and Platform Integrations

Apps and integrations offered by Optimizely for Third-Party integrations that may assist with productivity and the streamlining of processes.

- Optimizely Connect Platform – Customers can build and publish ODP integrations to connect and activate customer data without configuring or maintaining infrastructure.
- Third-Party integrations with ODP – Other Third-Party integrations.

Included services

The following services are included in this Software Service.

- Onboarding
  - Onboarding is described in the applicable Onboarding Documentation.
  - Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – Support Policy.

Optimizely Content Recommendations

General Overview

Content Recommendations let the customer personalize each visitor's online experience, one-to-one and in real time across all channels including but not limited to: online, mobile, email, in-store, call center, and print. Individuals see content suggestions, messages, promotions, images, and banners that are personally relevant to them.

Functionalities, Capabilities and Features

The functionality and capabilities of the Subscription may vary depending on whether the Features are part of the Subscription, and/or have otherwise been activated or de-activated by the Customer Features include, amongst others as described in the Documentation –

- Omni-channel tracking into the Recommendations Engine

- Content recommendations

AI features

Optimizely Opal features

See Optimizely Opal for a full list.

AI and machine-learning features

- Uses Natural Language Processing (NLP) to match content that shares the greatest similarity of an individual user's profile in real-time.
- Identify content gaps and saturation point using NLP with the Insights dashboard.
- Generate real-time interest profiles based on content consumption.

Prerequisite Optimizely Software Service

Not applicable.

APIs

https://docs.developers.optimizely.com/recommendations/docs/recommendations-api

Optimizely Options and Add-Ons

- **Content Management System (PaaS)** – Use the recommendation service and tracking scripts to process content and profile interests of Visitors to the Customer's site. Content recommendations are defined through sections and delivered in widgets added to the page templates.

Integrations to Other Optimizely Software Service

- **Configured Commerce** – Lets Customers create B2B profiles in ODP based on bill-to and ship-to data in addition to user data, allowing Customers to target Visitors more holistically.

Third-Party software and Platform Integrations

Not applicable.

Included services

The following services are included in this Software Service.

- Onboarding
  - Onboarding is described in the applicable Onboarding Documentation.
  - Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – Support Policy.

Optimizely Product Recommendations

General Overview

Product Recommendations lets the customer personalize each visitor's online experience, one-to-one and in real time across all channels including but not limited to: online, mobile, email, in-store, call center, personalized catalogs, and print. Individuals see product suggestions, messages, promotions, images, and banners that are personally relevant to them.

Functionalities, Capabilities and Features

The functionality and capabilities of the Subscription may vary depending on whether the Features are part of the Subscription, and/or have otherwise been activated or de-activated by the Customer

Optimizely Product Recommendations. Lets the customer display suitable product recommendations via the native integration package or custom implements towards the Product Recommendations Service API. Features include, amongst others as described in the Documentation -

- Omni-channel tracking into the Recommendations Engine

- Product recommendations

- Self-service widgets for personalization

Optimizely Email Triggers. Lets the customer display suitable recommendations within the content of messages in an email campaign and create transactional emails that can be used to re-engage visitors on scenarios such as abandoned carts. Features include, amongst others as described in the Documentation -

- Omni-channel tracking into the Recommendations Engine

- Templated product recommendations for use a part of email content in campaigns

- Behavioral transactional email triggers

AI features

AI and machine-learning features

- Uses Optimizely's algorithms to examine visitor behavior and recommend products.

Prerequisite Optimizely Software Service

 Not applicable.

APIs

https://docs.developers.optimizely.com/recommendations/docs/recommendations-api

Optimizely Options and Add-Ons

Commerce Connect and Search & Navigation – By applying machine learning and statistical analysis to behavioral data, Content Recommendations enables attribute boosting tailored for each individual Commerce Connect visitor to optimize the ranking of search results returned by Optimizely Search & Navigation.

Integrations to Other Optimizely Software Service

Not applicable.

Third-Party software and Platform Integrations

Not applicable.

Included services

The following services are included in this Software Service.

- Onboarding
    - Onboarding is described in the applicable Onboarding Documentation.
    - Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – Support Policy.

Optimizely Configured Commerce

General Overview

Configured Commerce provides tools and capabilities to build, host, and run commerce websites. it includes a headless commerce engine, a front-end visual editor/content management system (CMS), catalog search engine, and sundry commerce capabilities. The service is delivered via single-tenant cloud instances with multi-tenant services supporting. It may be hosted in any Hosting Region.

Functionalities, Capabilities and Features

The functionality and capabilities of the Subscription may vary depending on whether the Features are part of the Subscription, and/or have otherwise been activated or de-activated by the Customer Features include, amongst others as described in the Documentation -

- Cart/check out
- Order management
- Catalog manager
- User management
- Promotions
- Search
- Payment
- Pricing
- Segmentation
- Vendor-managed inventory (VMI)
- Digital asset management (DAM)

AI Features

Optimizely Opal features

See Optimizely Opal for a full list.

AI and machine-learning features

- Populate llms.txt to let large language models (LLMs) safely learn from your public product and content data. Configured Commerce generates only the llms.txt file and the Customer is responsible for populating the content within the file.
- Implement Commerce Search v3 to provide fast and relevant search results using machine-learning to improve understanding of user intent and product ranking (powered by Google Vertex AI and ElasticSearch v7).
- Use dynamic rules to auto-generate lists from custom properties and product attributes (powered by Optimizely).

Google Vertex AI

- Any use requires the provisioning of Optimizely Data Platform (ODP). A customer cannot self-activate usage of ODP without a valid subscription.

Prerequisite Optimizely Software Service

Not applicable.

APIs

- [Configured Commerce APIs](#) – RESTful-based services that interact with Configured Commerce data within the context of user interaction using JSON objects. These API objects are their respective methods are based on common HTTP verbs.

Optimizely Options and Add-Ons

- **B2B Analytics** – A powerful tool for measuring and monitoring the success of your B2B ecommerce business. Provides a set of prescriptive dashboards that let you take a deeper look into the orders and usage of your site and compiles data from three sources: your Configured Commerce site, Google Analytics (with Google Tag Manager), and your ERP.
- **Configured Commerce Mobile SDK** – Provides a foundation of a customizable native mobile app built for Configured Commerce so that Customers can mobilize their business.
- **Product Information Management (PIM) –** Lets Customers import data from numerous sources, normalize/clean, enrich, and manage that data. The product information in PIM is then provided to the catalog in Configured Commerce for use on Customers' commerce sites. PIM also provides workflow management for small teams collaboration on the product information.
- **Content Management System (PaaS)** – CMS provides a more robust content management experience than the built-in Spire CMS provides. Customers can use CMS to provide a content-rich ecommerce storefront, including blogs, industry case studies, customer forums, content, and product recommendations.

Integrations to Other Optimizely Software Service

- **Data Platform (ODP)** – Lets Customers [create B2B profiles](#) in ODP based on bill-to and ship-to data in addition to user data, allowing Customers to target Visitors more holistically.
- **Product Recommendations** – Enables a Recommended Products widget for Spire or Classic CMS so that Customers can present recommended products to their Visitors.

Third-Party Software and Platform Integrations

Apps and integrations offered by Optimizely for Third-Party integrations that may assist with productivity and the streamlining of processes.

- [Third-Party connectors](#)
- [Third-Party integrations](#)

Included services

The following services are included in this Software Service.

- Onboarding
  - Onboarding is described in the applicable Onboarding Documentation.
  - Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – [Support Policy](#).

Optimizely Campaign

General Overview

Optimizely Campaign lets you run omnichannel marketing campaigns and send professional marketing messages by email, mobile push, web push, direct mail, or SMS from a single software-as-a-service solution.

Functionalities, Capabilities and Features

Functionality and capabilities of the Subscription may vary depending on whether the Features are part of the Subscription, and/or have otherwise been activated or de-activated by the Customer

Features include, amongst others as described in the Documentation -

- Omnichannel marketing and one-shot campaigns
- Marketing automation
- Transactional mails
- A/B-Testing
- WYSIWYG content editor
- Opt-in processes
- Recipient management
- Self-service recipient list management
- Powerful segmentation
- Analytics
- Self-service domain management

AI Features

Optimizely Opal features

See Optimizely Opal for a full list.

AI and machine-learning features

- Subject-line generator (powered by GPT 3.5). This feature can be turned off by submitting a Support request.
- Text generator (powered by GPT 3.5). This feature can be turned off by submitting a Support request.

Prerequisite Optimizely Software Service

Not applicable.

APIs

- REST-API
- HTTP-API
- SOAP-API
- SMTP-API

Optimizely Options and Add-Ons

- **Coupon System** – Send promotional coupons.
- **Countdown Timers** – Display the time remaining to when your offer ends.
- **Sent Time Optimization** – Send messages when individuals are usually active in their inbox.
- **Email-App Preview** – Preview your emails in the most common email providers and browsers.
- **Post-click tracking** – Analyze actions by email recipients on your website.
- **Content interface** – Link external product databases to the content interface or content management system to display your shop products in your mailings.
- **Closed-loop/Batch-Sending interface** – Integrate data from your data warehouse or campaign management system into Optimizely Campaign and dispatch the campaign directly after the transfer of the data.
- **Webhook real-time reporting interface** – Send real-time event data about your campaigns from Optimizely Campaign to other applications.
- **Custom blocklists** – Manage multiple custom blocklists to exclude specific groups of mailing recipients who are not part of the global blocklist. The global blocklist is always applied.

Integrations to Other Optimizely Software Service

(With URL link to other relevant Documentation)

- [Optimizely Data Platform](#) – Store Visitor information and provide it to other products to enhance marketing activities.

Third-Party Software and Platform Integrations

Apps and integrations offered by Optimizely for Third-Party integrations that may assist with productivity and the streamlining of processes.

- [Ecommerce integrations](#)
- [Web analytics integrations](#)
- [CRM integrations](#)

Included Services

The following services are included in this Software Service.

- Onboarding
  - Onboarding is described in the applicable Onboarding Documentation.
  - Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – [Support Policy](#).

Optimizely Connect Platform

General Overview

Optimizely Connect Platform (OCP) provides two main features:

- **Developer Experience** – An app building toolkit and framework provided by Optimizely that enables Third-Party developers to build apps that are compatible with one or more Optimizely Software Service. Applications developed using OCP may be published to the Admin Center's App Directory following Optimizely's review and approval.
- **Data Syncs** – Enables Customers to configure and manage scheduled and real-time syncs between supported Third-Party software-as-a-service (SaaS) solutions and supported Optimizely Software Service, or between multiple supported Optimizely Software Service. Customers are responsible for the accuracy and appropriateness of their sync configurations and the data transferred.
- **Opal tool hosting** – Enables Customers who use Opal to host their own tools.

Functionalities, Capabilities and Features

The functionality and capabilities of the Subscription may vary depending on whether the Features are part of the Subscription, and/or have otherwise been activated or de-activated by the Customer.

Developer Experience. Lets developers build apps that connect supported external systems to one or more Optimizely Software Service. Features include, amongst others as described in the Documentation-

- User interface for managing app listings, retrieve testing credentials, gain sandbox access, and submit their app for review

- Automated OCP user provisioning

- Usage reporting and logs

- Local testing capabilities

Data Syncs. Lets Customers map data and fields between supported Third-Party SaaS solutions and Optimizely Software Service. Features include, amongst others as described in the Documentation -

- User interface for building data syncs

- Ability to extend destination schema to accept source data

- Visualize OCP data

HIPAA

OCP is not HIPAA-enabled. OCP should not be utilized, and should be disabled, by Customers utilising a HIPAA-enabled Software Service (CMS or Experimentation).

Officially supported Optimizely Software Service

Software Service	Source support	Destination support
Optimizely Graph	Yes	Yes
Optimizely Digital Asset Management (DAM)	Yes	No

CMS (SaaS) content	Yes, via Graph	Yes, via Graph

Supported Third-Party products

Third-Party apps supported by Optimizely for building integrations and data syncs with OCP.

Prerequisite Optimizely Software Service

Not applicable.

APIs

Not applicable.

Optimizely Options and Add-Ons

Not applicable.

Integrations to Other Optimizely Software Service

Not applicable.

Third-Party Software and Platform Integrations

Not applicable.

Included services

The following services are included in this Software Service.

- Onboarding
    - o Onboarding is described in the applicable Onboarding Documentation.
    - o Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – Support Policy.

Optimizely Opal

General Overview

Optimizely Opal is available as a chat interface and presents a variety of interactable in-app elements depending on the product. It is designed to empower Customers to make data-driven decisions, streamline workflows, and unlock new levels of efficiency and productivity. Customers must be on Opti ID to benefit from Optimizely Opal's features.

Optimizely Opal is available in most, but not all, Software Service. The applicable Software Service are listed below. Standalone Opal comes with all Optimizely Opal app functionality and OCP. Customers are responsible for connecting Optimizely Opal to their Third-Party applications and platforms.

Important announcements

Important updates for Opal are published at https://support.optimizely.com/hc/en-us/articles/36304551863181.

This also includes updates to earlier pricing models and transition to new pricing including the available features under new pricing models.

Managing Optimizely Opal app

Administrators can manage instance access to Optimizely Opal and create and configure instruction agents that customize Optimizely Opal's responses.

LLM Model

See *Artificial Intelligence* to understand how Optimizely uses LLMs.

HIPAA

Optimizely Opal is not HIPAA enabled. Optimizely Opal should not be utilized, and should be disabled, by Customers utilising a HIPAA-enabled Software Service (CMS or Experimentation).

Functionalities, Capabilities and Features

The functionality and capabilities of the Subscription may vary depending on whether the Features are part of the Subscription, and/or have otherwise been activated or de-activated by the Customer.

For Customers on Opti ID, Administrators can turn off all applicable Optimizely Opal and AI features from Admin Center > Settings > Generative AI. Customers who are not on Opti ID are not eligible for Optimizely Opal and must refer to each Software Service's included AI feature for the method of turning off.

Optimizely Opal app. Features include, amongst others as described in the Documentation –

- Chat with Optimizely Opal and view chat history.
- Configure and add pre-built instructions.
- Create custom instructions.
- Add default agents.
- Create custom agents using specialized agents.
- Add system tools.
- Create custom tools.

- Add [connector tools to Opal from third-parties](#) through Optimizely Connect Platform (OCP).

- View [Opal agent usage](#) using Optimizely Reporting.

- Create [workflow agents](#).

Analytics. Features include, amongst others as described in the Documentation -

- [Chat with Optimizely Opal](#).

- [Interpret and summarize the data in your explorations](#).

- [Generate explorations using natural language](#).

Campaign. Features include, amongst others as described in the Documentation -

- Use [tools](#) to retrieve detailed information about Smart Campaigns and generate Smart Campaign reports that include statistics on recipients, bounces, unsubscribes, opens, and clicks.

Collaboration. Features include, amongst others as described in the Documentation -

- Use AI to write experimentation plans and suggest hypotheses and variations from the [global header](#).

- [Use AI to refine](#) variations and written briefs.

Commerce Connect. Features include, amongst others as described in the Documentation -

- [Chat with Optimizely Opal](#).

- [Translate individual products and variants](#).

- [Bulk translate catalog content.](#)

Configured Commerce. Features include, amongst others as described in the Documentation -

- [Chat with Optimizely Opal](#).

- [Map job step fields with Optimizely Opal](#).

Content Marketing Platform. Features include, amongst others as described in the Documentation -

- [Chat with Optimizely Opal](#).

- [Generate AI content](#) for a task.

- [Get writing assistance](#).

- [Translate content into a locale using the omnichannel editor](#).

- [Use AI campaign kits to create campaigns](#).

Content Management System (PaaS). Features include, amongst others as described in the Documentation -

- [Chat with Optimizely Opal](#).

Content Management System (SaaS). Features include, amongst others as described in the Documentation -

- [Chat with Optimizely Opal](#).

- [Use @content_model_creation](#) to automatically create content models by having Opal analyze URLs or images.

Content Recommendations. Features include, amongst others as described in the Documentation –

- Use tools to retrieve the highest-performing content items, gather performance metrics for the most engaging topics, and analyze the performance of the recommendation widget.

Feature Experimentation. Features include, amongst others as described in the Documentation -

- Chat with Optimizely Opal.

- Brainstorm ideas for flag variables.

- Brainstorm ideas for flag variations.

- Summarize experiment results.

- Get test ideas.

- Review your experiment configuration and recommend changes to maximize your odds of reaching statistical significance using the Experiment Review Agent.

Optimizely Data Platform (ODP)[14]. Features include, amongst others as described in the Documentation -

- Create Opal-suggested real-time audiences.

- Generate a summary of a customer's event history.

- Use tools to get suggestions for real-time audiences based on your existing schema and have Opal create them for you.

Optimizely Data Platform (ODP) + Content Recommendations[15]. Features include, amongst others as described in the Documentation -

- Enable generative AI topic enrichment for customer records.

Personalization. Features include, amongst others as described in the Documentation -

- Chat with Optimizely Opal.

- Summarize descriptions for variations.

- Generate copy suggestions for variations in the Visual Editor.

- Modify and update existing website elements, create new ones, and generate and apply enhancement suggestions using the AI variation development agent.

Product Information Management. Features include, amongst others as described in the Documentation -

- Chat with Optimizely Opal.

- Use tools to retrieve general statistics from the Dashboard.

Web Experimentation. Features include, amongst others as described in the Documentation -

- Chat with Optimizely Opal.

- Summarize descriptions for variations.

- Generate copy suggestions for variations in the Visual Editor.

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[14] Only for United States-based ODP customers.

[15] Only for United States-based ODP + Content Recommendations customers.

- Summarize experiment results.

- Get test ideas.

- Modify and update existing website elements, create new ones, and generate and apply enhancement suggestions using the AI variation development agent.

- Review your experiment configuration and recommend changes to maximize your odds of reaching statistical significance using the Experiment Review Agent.

Prerequisite Optimizely Software Service

Customers must have at least one of the following Software Service to gain access to the relevant Optimizely Opal features.

- **Analytics** – Enables Customers to use their data warehouse as the source of truth, combining event-based and state-based data from various systems to define and analyze metrics critical to the success of their business.
- **Campaign** – Lets you run omnichannel marketing campaigns and send professional marketing messages by email, mobile push, web push, direct mail, or SMS from a single software-as-a-service solution.
- **Commerce Connect** – Provides catalog management, cart, pricing, transactions, order management, and promotion capabilities for Content Management System (PaaS).
- **Configured Commerce** – Provides tools and capabilities to build, host, and run commerce websites. it includes a headless commerce engine, a front-end visual editor/content management system (CMS), catalog search engine, and sundry commerce capabilities.
- **Content Marketing Platform** – Lets teams share plans, collaborate on assets and execute campaigns.
- **Content Management System (PaaS)** – Includes a multi-lingual enterprise search and navigation engine, a delivery network, web application firewall, and managed services.
- **Content Management System (SaaS)** – A fully managed multi-lingual enterprise CMS with search capabilities, Visual Builder, a GraphQL-based delivery API, and a REST management API.
- **Content Recommendations** – Lets the customer personalize each visitor's online experience, one-to-one and in real time across all channels including but not limited to: online, mobile, email, in-store, call center, and print.
- **Feature Experimentation** – Lets the Customer control their application using feature flags and run experiments across all implemented channels.
- **Data Platform** – Lets Customers harmonize their data from any system or tool via integrations or APIs to build a 360-degree view of their visitors.
- **Personalization** – Help Customers personalize the experiences they deliver through their Customer Properties.
- **Product Information Management** – Add-on for Configured Commerce that lets Customers import data from numerous sources, normalize/clean, enrich, and manage that data.
- **Web Experimentation** – Lets the Customer build and launch various experiments within the context of the browser.

APIs

Not applicable.

Optimizely Options and Add-Ons

- **Collaboration** – Lets the Customer manage their experiment ideation, planning, and hypothesis-creation process with Feature Experimentation, Web Experimentation, or Personalization.

Integrations to Other Optimizely Software Service

- **Optimizely Connect Platform (OCP)[16]** – Use OCP to host custom tools on a publicly available URL for Optimizely Opal to connect to.

Third-Party Software and Platform Integrations

Third-Party integrations – Integrations made available maintained by Optimizely that may make Optimizely Opal available for use in Third-Party apps and agent-to-agent use cases.

Included services

The following services are included in this Software Service.

- Onboarding
    - Onboarding is described in the applicable Onboarding Documentation.
    - Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – Support Policy.

Terms of Use

Use of Opal is subject to Optimizely's AI use terms detailed in the Optimizely Product Use Terms – Opal terms of use. The Opal terms of use may contain disclaimers in respect of use of external data sources.

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[16] **OCP is not a HIPAA enabled Software Service.**

Optimizely Hosting Regions

Optimizely's Software Service are strategically offered in key regions worldwide - North America, Europe and Asia-Pacific and the Middle East, to help ensure low latency and compliance with local regulations. Optimizely's global network of data centers operated by Microsoft Azure, Google Cloud Platform or Amazon Web Services ("Third-Party Data Center Providers") delivers reliable cloud services with minimal latency and high availability.

With the exception of Experimentation, Personalization and Analytics (formerly, NetSpring), which are only US-hosted, the Hosting Region and Country is determined by default by Customer's geo-location – (that is, its designated business address in its Order Form).

The currently-offered data center regions and countries made available by Optimizely from global cloud date centers of the Third-Party Data Center Providers are set out in Appendix I ("Data Centers").

Not all Data Centers of the Third-Party Data Center Providers[17] are made available by Optimizely, and not all Software Service are made available in an available Data Center. Available Data Centers published by Optimizely are subject to update, and some published Data Centers may be not available for technical, resource or other issues, and alternate Data Centers in Region will be provisioned. The Optimizely Data Centers for Software Service offered by Optimizely is available upon request (through the Customer's Customer Success Manager at Optimizely).

All of Optimizely's Sub-processors, including the Third-Party Data Center Providers, are detailed at https://www.optimizely.com/legal/sub-processors.

Customers may request from Optimizely a preferred location for the production-instance based on their regional requirements and regulatory needs prior to Optimizely's provisioning of the Software Service. If Customer's prefer any alternate Data Center region or country, Customers may request an alternate Data Center in their Order Form for the Software Service ("Nominated Data Center"). In the case of a Microsoft Azure Designated Data Centre, that Data Centre may be not available for technical, resource or other issues of Microsoft Azure, in which case an alternate Data Centers in the Customer's region will be provisioned by Optimizely ("Alternative Data Center"). Customers will be informed prior to provisioning if an Alternative Data Center is to be provisioned by Optimizely in lieu of the Nominated Data Center.

Pre-production instances of the certain Software Service (Content Recommendations and Product Recommendations) are only hosted in North Europe. Further details are available on request from Optimizely.

Geo-fenced support is available for all Optimizely's Software Service, subject to some restrictions-fenced support requires Customer to have a Geo-fenced Support Addendum with Optimizely. A Geo-fenced Support Addendum may be entered into by the Customer at the time of the Customer's Order Form for the applicable Software Service, or at any later time throughout the Subscription.

Optimizely deploys secondary data centers in the Region of the primary data center for backup and disaster recovery purposes.

Appendix I (Available Third-Party data center Regions and Countries) follows.

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[17] The global datacenters of MS Azure are published at https://datacenters.microsoft.com/globe/explore/, Google Cloud Platform's at https://cloud.google.com/about/locations, and Amazon Web Services' at https://www.datacenters.com/providers/amazon-aws/data-center-locations.

Appendix I: Currently-Available Data Center regions and countries (as at 11 February 2026) [18]
[*Subject to update*]

SOFTWARE SERVICES	UNDERLYING THIRD-PARTY HOSTER	HOSTING REGION	HOSTING COUNTRY	STATES OR PROVINCE
Content Management System (PaaS) [19]	MS Azure	APJ	Australia	NSW & Victoria
			Singapore	Singapore
		Europe	Ireland	Dublin
			Netherlands	Noord-Holland
			Norway	Oslo
			Sweden	Gävleborg
			England	Greater London
		North America	Canada	Ontario & Quebec
			USA	Iowa, Virginia, California & Texas
		Middle East	United Arab Emirates	Dubai
Content Management System (SaaS)	MS Azure	APJ	Australia	NSW
		Europe	Ireland	Dublin
		North America	USA	Iowa, Virginia, California & Texas
		Middle East	United Arab Emirates	Dubai
Commerce Connect [20]	MS Azure	APJ	Australia	NSW & Victoria
			Singapore	Singapore
		Europe	Ireland	Dublin
			Netherlands	Noord-Holland
			Norway	Oslo
			Sweden	Gävleborg
			England	Greater London
		North America	Canada	Ontario & Quebec
			USA	Iowa, Virginia & California
		Middle East	United Arab Emirates	Dubai
Content Marketing Platform	Amazon Web Services[21] Google Cloud Platform[22]	North America	USA	AWS – Virginia
				GCP – Iowa & South Carolina

[18] Not all Software Service may be made available in an available Data Center of MS Azure, Google Cloud Platform or Amazon Web Services. Available Hosting Regions are subject to update. Available Data Center for Software Service are available from Optimizely upon request.

[19] Search & Navigation is CMS DC-paired.

[20] Search & Navigation is Commerce DC-paired.

[21] Application data is US Hosted. Customer assets (files in library, task, attachment) can be one stored in the US, EU or APJ hosted dependently from Application data, dependant upon Customer geo-location, and the Software Service configuration

[22] Application data is US Hosted. Customer assets (files in library, task, attachment) can be one stored in the US, EU or APJ hosted dependently from Application data, dependant upon Customer geo-location, and the Software Service configuration

Currently-Available Data Center regions and countries (as at 11 February 2026)
[*Subject to update*]

SOFTWARE SERVICES	UNDERLYING THIRD-PARTY HOSTER	HOSTING REGION	HOSTING COUNTRY	STATE OR PROVINCE
Experimentation[23]	Google Cloud Platform	North America	USA	Iowa & South Carolina
		Europe[24]	Refer footnote 24	
Personalization[25]	Google Cloud Platform	North America	USA	Iowa & South Carolina
Opal	Google Cloud Platform (*Gemini*)	GCP's Gemini's data centers load balance: GCP USA (Iowa, Oregon, Nevada & Virginia; GCP EU (Belgium and Finland, or GCP APJ (Singapore)		
Configured Commerce	MS Azure Amazon Web Services[26]	APJ	Australia	NSW
		Europe	Ireland	Dublin
		North America	USA	Virginia
Analytics (*formerly, NetSpring*)	Amazon Web Services	North America	USA	Virginia
Data Platform (ODP)	Amazon Web Services	APJ	Australia	NSW
		Europe	Ireland	Dublin
		North America	USA	Virginia
Connection Platform (OCP)	Amazon Web Services	APJ	Australia	NSW
		Europe	Ireland	Dublin
		North America	USA	Virginia
Graph	MS Azure	APJ	Australia	NSW
		Europe	Ireland	Dublin
		North America	USA	Virginia
		Middle East	United Arab Emirates	Dubai
Product Recommendations	MS Azure	Europe	Sweden	Gävle
		North America	USA	California
Content Recommendations[27]	MS Azure	APJ	Australia	NSW
		Europe	Netherlands	Noord-Holland
		North America	Canada	Quebec
			USA	Iowa, Virginia & California
Campaign	Orange Business Services	Europe	Germany	Berlin
	Google Cloud Platform	Europe	Germany	Berlin

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[23] EXP has some features hosted on Amazon Web Services.

[24] EU-hosting is for the experimentation data; *that is*, Customer's Experimentation visitor data. The administrative data of the Software Service, including experimentation configuration and parameter settings of the Customer, remains US hosted. With the EU-hosting of that experimentation data, some features are restricted: raw events exports are not available for Europe-hosted customers, until further notice. Google Cloud Platform EU-hosting is multi-EU; that is, there is not a single data centre utilised for the EU Experimentation hosting.

[25] Refer footnote 2323.

[26] Customer website assets (userfiles), Customer product search, and Customer-visible application logs.

[27] Legacy Content Recommendation customers may still be on AWS data centre (US-East: Virginia).

Glossary of Terms

API: application programming interface - a set of functions and procedures that allow the creation of applications which access a Software Service.

BAA: as business associate agreement between a covered entity and business associate under HIPAA.

Business associate: as defined under HIPAA.

covered entity: as defined under HIPAA.

Customer: individual or entity that purchased one or more Software Service.

Capability: is a described capability or Feature of a Software Service[28].

CS&A: Optimizely's Customer Success and Advocacy.

Customer Success Manager (CSM): a CS&A representative, allocated to a Customer's Subscription, to facilitate Customer adoption of the Software Service.

DORA: the EU Digital Operational Resilience Act.

Enhancements: in the context of Customer's access and use of the Software Service, configurations, additional features, functionalities and capabilities, and it includes integrations.

Environment: the data center facilities, servers, networking equipment, operating systems, and data storage mechanisms selected and used by Optimizely to operate and provide the Software Service.

ePHI: electronic protected health information as defined under HIPAA.

ePHI-Enabled Software Service or **HIPAA Software Service**: the Software Service as identified in an applicable Order Form with Optimizely as an ePHI enabled Software Service.

Feature: is a feature of a Software Service.[29]

HIPAA: the US Health Insurance Portability and Accountability Act.

HIPAA Rules: the Privacy Rule, the Security Rule and the Breach Notification Rule under HIPAA.

Hosting Region: as outlined in each of the Service Descriptions of the Software Service[30].

Onboarding Service: as defined in the Product Supplement.

Optimizely: Optimizely North America Inc. and Optimizely AB and their respective Affiliates (as defined in Software Service Use Terms).

Optimizely Support: the global Optimizely support organization.

Optimizely Third Parties: Optimizely subcontractors.

Order Form: Optimizely's order form with the Customer for its Software Service subscriptions.

SSO: Single Sign-On.

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[28] Some capabilities may not be available in all countries.

[29] Some features may not be available in all countries.

[30] The Hosting Region may be identified in the Order Form upon Customer request.

Subscription: a Customer's Software Service subscription.

Subscription Agreement: the Customer's written agreement with Optimizely with respect to its Subscription.

Third-Party: any third party other than Optimizely and Customer, and their respective Affiliates.

Third-Party Enhancement: any optional Third-Party Software and/or integrations to Third-Party Platforms.

Third-Party Platform: any Third-Party technology platform, including website.

Third-Party Service: Third-Party cloud-service hosting infrastructure (and associated services) and the Third-Party networks and Third-Party content providers as made available by Optimizely as part of the Software Service.

UNSPSC: United Nations Standard Products and Services Code.

URL: Uniform Resource Locator.

User: A person (or technology) accessing a Software Service with an assigned account and password.

VAT: Value-Added Tax.

Visitor: A person (or technology) that visits a Customer's website that utilizes a Software Service.

World: the *Optimizely Support Portal*, and the *Optimizely Developer Portal*: websites published by Optimizely at https://world.optimizely.com, and its sub-sites including https://support.optimizely.com/hc/en-us and https://docs.developers.optimizely.com/, where Optimizely publishes Documentation, information on releases, and related Software information, and other relevant information about the Software Service, as updated from time to time.

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IMPORTANT DISCLAIMERS AND LEGAL INFORMATION

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Gender-Related Language. We try not to use gender-specific word forms and formulations. As appropriate for context and readability, Optimizely may use masculine word forms to refer to all genders.

Revision History

The following table provides a brief history of the updates to this guide. Optimizely updates the technical

documentation for its Software Service if

- software changes delivered in service packs or hot fixes require a documentation update to correctly reflect the new or changed functionality;
- the existing content is incorrect or user feedback indicated that important content is missing.

Optimizely reserves the right to update its technical documentation without prior notification. Most documentation updates will be made available in the same week as the Software Service packs are released, but critical documentation updates may be released at any time.

Version	Month/Year of Update	Updated Chapter/Section	Short Description of Change
01	01/14	N/A	Initial version Consolidation and updating of all prior-published stand-alone Service Descriptions). Introduction of Common Terms, HIPAA, DORA and AI
02	02/1	Common Descriptions to All Software Service	Added Hosting Regions link to Optimizely Hosting Regions.
		GenAI policies and terms of use	Fixed minor typos.

		All Functionalities, Capabilities and Features sections	Fixed minor typos.
		Optimizely Hosting Regions	Consolidated all Regional Data Centers sections into Optimizely Hosting Regions.
03	04/16	Artificial Intelligence	Added callout regarding the monetization of Optimizely Opal effective May 7, 2025.
		Australian Prudential Regulation	Added new section.
		All listed Software Service	Replaced Generative AI section with Optimizely Opal. Replaced Machine-learning features powered by Optimizely section with AI and machine-learning features. Reorganized AI features into Optimizely Opal and AI and machine-learning features sections.
		Content Management System (PaaS)	Clarified HIPAA ePHI enabled details. Clarified Digital Asset Management as an option.
		Content Management System (SaaS)	Clarified HIPAA ePHI enabled details. Added Digital Asset Management as an option.
		Content Marketing Platform	Added AI translations for omnichannel authoring to Generative AI features.
		Experimentation	Clarified HIPAA ePHI enabled details. Added AI variation summary to Generative AI features. Added Edge Delivery to feature list. Added Digital Asset Management as an option.
		Personalization	Added Edge Delivery to feature list. Added Digital Asset Management as an option.
		Analytics	Added CUPED to feature list.
		Data Platform	Updated method of turning off Optimizely Opal feature.

		Product Recommendations	Added self-service widgets to feature list.
			Corrected Machine-learning features list.
		Configured Commerce	Added intelligent field mapper to Generative AI features.
			Removed Product Information Management (PIM) generative AI features.
		Optimizely Hosting Regions	Added Europe Hosting Region for Experimentation.
04	05/13	Artificial Intelligence	Updated list of Google LLMs.
			Updated list of Software Service affected by the transition to a credit-based usage and billing model.
			Updated HIPAA-related verbiage.
		All listed Software Service	Updated header names to include "Optimizely".
		Optimizely Content Marketing Platform	Updated Optimize Opal features section to refer to Optimizely Opal Software Service.
			Updated AI and machine-learning features list.
		Optimizely Experimentation	Updated Optimize Opal features section to refer to Optimizely Opal Software Service.
			Updated AI and machine-learning features list.
		Optimizely Personalization	Updated Optimize Opal features section to refer to Optimizely Opal Software Service.
			Updated AI and machine-learning features list.
		Optimizely Data Platform	Updated Optimize Opal features section to refer to Optimizely Opal Software Service.
		Optimizely Opal	Added new Software Service.
05	06/27	Entire document	Fixed minor typographic errors.
		Common Descriptions to All Software Service	Added Customer Data Use by Optimizely.
		Optimizely Content Management System (SaaS)	Added Frontend Hosting to Optimizely Options and Add-Ons.
			Updated APIs link.

		Optimizely Personalization	Added Contextual bandits to Functionalities, Capabilities, and Features. Removed Stats Accelerator from the AI and Machine-learning feature.
		Optimizely Connect Platform	Added new Software Service.
06	11/10	Entire document	Fixed minor typographic errors. Replaced all references to Data Platform segments and real-time segments with audiences and real-time audiences.
		Common Descriptions to all Software Service	Updated description for Customer Data Use By Optimizely and APIs, SDKs, and MCPs. Added Service Continuity.
		Artificial Intelligence	Updated Google Gemini links.
		Optimizely Content Management System (PaaS)	Updated Optimize Opal features section to refer to Optimizely Opal Software Service. Added CMS Platform Plus and Frontend Hosting as optional add-ons. Added Optimizely Connect Platform (OCP) as an available integration.
		Optimizely Commerce Connect	Updated Optimize Opal features section to refer to Optimizely Opal Software Service Updated Optimizely Graph integration to support backend implementation.
		Optimizely Content Management System (SaaS)	Updated Optimize Opal features section to refer to Optimizely Opal Software Service. Added Forms to Functionalities, Capabilities, and Features. Added Optimizely Connect Platform (OCP) as an available integration.
		Optimizely Content Marketing Platform	Added activity logs to Functionalities, Capabilities, and Features. Added Optimizely Connect Platform (OCP) as an available integration.
		Optimizely Graph	Added Optimizely Connect Platform (OCP) as an available integration.
		Optimizely Experimentation	Added reporting to Functionalities, Capabilities, and Features for Feature

			Experimentation and Web Experimentation. Added Contextual Bandits to AI and machine-learning features.
		Optimizely Analytics	Updated General Overview. Updated Optimize Opal features section to refer to Optimizely Opal Software Service.
		Optimizely Data Platform	Added B2B Schema integration with Configured Commerce.
		Optimizely Configured Commerce	Updated Optimize Opal features section to refer to Optimizely Opal Software Service. Added Commerce Search v3 to AI and machine-learning features. Added B2B Schema integration with ODP.
		Optimizely Connect Platform	Added HIPAA section.
		Opal	Add information regarding standalone Optimizely Opal. Added HIPAA section. Updated feature list for Opal app, Analytics, Configured Commerce, Content Marketing Platform, Content Management System (SaaS, Content Management System (PaaS), Commerce Connect, Data Platform, Web Experimentation, and Personalization. Added Optimizely Connect Platform as an Optimizely integration. Added Third-Party integration details. Added Terms of Use.
		Optimizely Hosting Regions	Updated hosting regions for Content Management System (PaaS), Content Management System (SaaS), Content Marketing Platform, Experimentation, Opal, Connect Platform (OCP), and Campaign.
07	02/13	Common Descriptions to All Software Service	Updated Optimizely Product Supplement, Customer Data Use By Optimizely, Professional Services, Sub-processes, and APIs, SDKs, MCPs.
		Opti ID	Added new section.

		Configured Commerce	Updated AI and machine-learning features.
		Campaign	Added Optimizely Opal features section to refer to Optimizely Opal Software Service.
		Opal	Updated feature list for Opal app, Campaign, Content Management System (SaaS), Commerce Connect, Data Platform, Feature Experimentation, Product Information Management, Web Experimentation, and Personalization. Updated prerequisite software list to include Campaign, Content Recommendations, and Product Information Management. Updated Terms of Use section.
		Optimizely Hosting Regions	Updated details and hosting regions for Content Management System (PaaS) and Content Management System (SaaS).

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