SERVICES DESCRIPTIONS FOR THE OPTIMIZELY SOFTWARE SERVICES

Introduction

About this Services Description

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

This Services Description applies to the following Software Services:

Contents

Introduction

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

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

This Services Description is Documentation for the purposes of the warranty under Customers' subscription agreements with Optimizely.

Each of the technical features, functions and capabilities of a solution in this Services Description may be described in greater detail in the solution Documentation. 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).

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.

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 Services

Hosting regions. Optimizely's hosting regions (data center locations) are hosted by MS Azure and Google Cloud Platform, and Amazon Web Services.[1] Not all Data Centers offered by Amazon Web Services, MS Azure and Google Cloud Platform are made available by Optimizely, and not all Software Services may be made available in an available Data Center of MS Azure and Google Cloud Platform or Amazon Web Services. Available Hosting Regions listed in this Service Description are subject to update. Available Data Center for Software Services are available from Optimizely upon request.

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

Optimizely Product Supplement. The Optimizely Product Supplement — available at https://www.optimizely.com/legal/product-supplement — applies to all Optimizely Software Services

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),

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[1] Amazon Web Services – utilised by Optimizely for Analytics and legacy Content Marketing Platform (CMP) Customers – will no longer be offered by Optimizely as an available Hosting Region for CMP or any Services (other than Analytics).

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 solutions require Professional Services, which are available from Optimizely's Expert Services directly, under separate statements of work, and for fees payable directly to Optimizely.

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 Services are published at https://www.optimizely.com/legal/sub-processors/third-party, 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. Use of APIs made available to Customers are subject to any 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 Concur APIs. API keys are Optimizely Confidential Information. Optimizely's API & SDK use terms are published at https://www.optimizely.com/legal/api-sdk-terms/.

Third-party Applications and Platform Integrations. Certain Software Services 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 Services, and are published at https://www.optimizely.com/legal/third-party-add-ons-platform-integration-terms/.

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 Solution 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. The Customer User Acceptance Policy for the Software Services is published by Optimizely at https://www.optimizely.com/legal/customer-acceptable-use-policy, as updated from time to time.

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. Refer to https://world.optimizely.com/services/service-continuity-policy/

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.

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 Services. 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 Services. An Optimizely-approved BAA will be required for Optimizely's commitments to the HIPAA Rules. Only those Software Services identified as an ePHI-enabled applicable Software Services in the Service Descriptions below are available as HIPAA supported.

Artificial Intelligence

Optimizely's Software Services 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.

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 are not intended to create obligations under HIPAA, and do not satisfy HIPAA requirements. **Customers should not use any GenAI feature any to transmit ePHI.**

Google Gemini Pro 1.5 and Chat-Bison

- 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

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 ChatGPT 3.5, ChatGPT 4.0, and DALL-E policies

- 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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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 of 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 BAA is required before Customer may process any ePHI in ePHI-enabled Software Service.

AI features

Machine-learning features powered by Optimizely
N/A

Generative AI features
N/A

Prerequisite Optimizely Software Services

N/A

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

- **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.

Integrations to Other Optimizely Software Services

(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.
- Digital Asset Management – Lets editors select and link resources from Optimizely DAM.
- 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 data from CMS and any system or tool to understand their customer data through insights, observations, and predictions generated via Artificial Intelligence (AI) and Machine Learning (ML). Users can act on their data by building sophisticated filters and segments to target across the Optimizely platform or via integrations to channels such as Google and Facebook for advertising.
    - **CDP Audience Sync via ODP** – Users can purchase the CDP Audience Sync version of ODP to exclusively enable Real-time Segments 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 Segments can be successfully 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.
- **Embedded Apps** – Apps that add capabilities to the Optimizely editor UI or enhance existing capabilities within the platform.

Regional Data Center

Available Hosting Regions:

Geography	Hosting Region	Hosting Region Pair	Search & Navigation	Automatic Failover Hosting Region (Add-on)
Asia-pacific	Southeast Asia (Singapore)	East Asia	Southeast Asia	East Asia
Australia	Australia East (New South Wales)	Australia Southeast	Australia East	Australia Southeast
Australia	Australia Southeast (Victoria)	Australia East	Australia East	Australia East
Europe	North Europe (Ireland)	West Europe	North Europe	West Europe
Europe	UK South (London)	UK West	UK South	UK West
Europe	West Europe (Netherlands)	North Europe	North Europe	North Europe
North America	Canada Central (Toronto)	Canada East	Canada East	Canada East
North America	Canada East (Quebec City)	Canada Central	Canada East	Canada Central
North America	Central US (Iowa)	East US 2	East US	East US 2
North America	East US (Virginia)	West US	East US	West US
North America	East US 2 (Virginia)	Central US	East US	Central US
North America	West US (California)	East US	West US	East US
Norway	Norway East (Oslo)	Norway West	North Europe	(Not available)
Middle East	United Arab Emirates North (Dubai)	UAE Central	Southeast Asia	(Not available)
Sweden	Sweden Central (Gävle)	Sweden South	Sweden Central	(Not available)

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

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

Included services
The following services are included in this Software Service.
- Onboarding
    - Onboarding is described in the applicable Documentation of the relevant Software Service.
    - Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – Support Policy.

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 of 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

Machine-learning features powered by Optimizely
N/A

Generative AI 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 Services

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
N/A

Optimizely Options and Add-ons

- **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.
- Community API – A collection of extensible services for defining and collecting community-generated content.

Integrations to Other Optimizely Software Services

(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 data from CMS and any system or tool to understand their customer data through insights, observations, and predictions generated via Artificial Intelligence (AI) and Machine Learning (ML). Users can act on their data by building sophisticated filters and segments to target across the Optimizely platform or via integrations to channels such as Google and Facebook for advertising.
  - o **CDP Audience Sync via ODP** – Users can purchase the CDP Audience Sync version of ODP to exclusively enable Real-time Segments 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 Segments can be successfully used in conjunction with CMS.

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.

Regional Data Center
Available Hosting Regions:

Geography	Hosting Region	Hosting Region Pair	Search & Navigation	Automatic Failover Hosting Region (Add-on)
Asia-pacific	Southeast Asia (Singapore)	East Asia	Southeast Asia	East Asia
Australia	Australia East (New South Wales)	Australia Southeast	Australia East	Australia Southeast
Australia	Australia Southeast (Victoria)	Australia East	Australia East	Australia East
Europe	North Europe (Ireland)	West Europe	North Europe	West Europe
Europe	UK South (London)	UK West	UK South	UK West
Europe	West Europe (Netherlands)	North Europe	North Europe	North Europe
North America	Canada Central (Toronto)	Canada East	Canada East	Canada East
North America	Canada East (Quebec City)	Canada Central	Canada East	Canada Central
North America	Central US (Iowa)	East US 2	East US	East US 2
North America	East US (Virginia)	West US	East US	West US
North America	East US 2 (Virginia)	Central US	East US	Central US

North America	West US (California)	East US	West US	East US
Norway	Norway East (Oslo)	Norway West	North Europe	(Not available)
Middle East	United Arab Emirates North (Dubai)	UAE Central	Southeast Asia	(Not available)
Sweden	Sweden Central (Gävle)	Sweden South	Sweden Central	(Not available)

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

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

Included services
The following services are included in this Software Service.
- Onboarding
  - o Onboarding is described in the applicable Documentation of the relevant Software Service.
  - o Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – Support Policy.

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 of de-activated by the Customer.
Features include, amongst others as described in the Documentation -

- Headless site configuration
- Continuous releases
- Visual Builder
- Graph integration
- Multiple website management
- Hosting through Vercel/Netlify
- Visual editing
- Multi-language management
- Interactive preview
- Customer elements
- Template management
- Multi-step workflows
- Application management

HIPAA ePHI enabled

As from 1 January 2025, CMS (SaaS) is available for a new Subscription as an ePHI-enabled Software Service. A BAA is required before Customer may process any ePHI in ePHI-enabled Software Service.

AI features

N/A

Prerequisite Optimizely Software Services

- 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 Segments can be successfully used with additional Optimizely products.

APIs

https://docs.developers.optimizely.com/content-management-system/v1.0.0-CMS-SaaS/docs/overview-of-cms-saas

CMS (SaaS) includes an interactive UI where Users can author content and view a live preview using Optimizely's Visual Builder, along with technology-agnostic REST and GraphQL APIs, which lets Users manage content programmatically. By administering content in CMS (SaaS), Users can focus on delivering business value on the front end.

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.

Integrations to Other Optimizely Software Services
(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 data from CMS and any system or tool to understand their customer data through insights, observations, and predictions generated via Artificial Intelligence (AI) and Machine Learning (ML). Users can act on their data by building sophisticated filters and segments to target across the Optimizely platform or via integrations to channels such as Google and Facebook for advertising.
  - **CDP Audience Sync via ODP** – Users can purchase the CDP Audience Sync version of ODP to exclusively enable Real-time Segments 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 Segments can be successfully 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.

Regional Data Center
Available Hosting Regions:

Geography	Hosting Region
Australia	Australia East
Europe	North Europe
North America	East US
Middle East	United Arab Emirates North

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

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

Included services
The following services are included in this Software Service.
- Onboarding
  - Onboarding is described in the applicable Documentation of the relevant Software Service.
  - Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – Support Policy.

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 of de-activated by the Customer.

Features include, amongst others as described in the Documentation -

- Task management
- Task templates
- Campaign management
- Campaign templates
- Workflow management
- Digital asset management
- Content management
- Idea lab
- Omni-channel authoring
- Multi-channel publishing
- Security and user management
- Analytics

AI features

Machine-learning features

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).

Generative AI features

Content Marketing Platform

Administrators can toggle all generative AI features on or off for all users of an instance from the avatar > Organization > Opal tab.

- Bring your own AI (BYOAI): deploy your own LLM models or AI engines to generate content and determine what powers co-pilot chat (supports Writer and Jasper).
- Ideate with Optimizely Opal (powered by GPT 4.0).
- Generate AI content for a task (powered by GPT 4.0).
- Generate AI images for a task (powered by DALL-E).
- Text correction and editing (powered by GPT 4.0).

Prerequisite Optimizely Software Services

N/A

APIs

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

Optimizely Options and Add-Ons
- **Digital Asset Management (DAM)** – Use the Library to manage, discover, and reuse digital assets for campaigns.

Integrations to Other Optimizely Software Services
(With URL links to other relevant Documentation)
- [Content Management System (PaaS)](url) – Manage the content production lifecycle of CMS pages using tasks and workflows in CMP.

Third-party Software and Platform Integrations
[Third-party integrations](url) – Apps and integrations made available maintained by Optimizely and third-parties that may assist with productivity and the streamlining of processes.

Regional Data Center
Previously-available Hosting Regions (as at 14 January 2025):

Geography	Hosting Region
North America	US East (Virginia)
North America (backup)	US West (California)

Available Hosting Regions from 14 January 2025:

Geography	Hosting Region
North America	US West (Oregon)
North America (backup)	US Central (Iowa)

Germany (Frankfurt) is an available option to Customers for file storage.

Included services
The following services are included in this Software Service.
- Onboarding
    - Onboarding is described in the applicable Documentation of the relevant Software Service.
    - Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – [Support Policy](url).

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 of de-activated by the Customer.

Features include, amongst others as described in the Documentation -

- Index any data source
- AI-powered semantic search

AI features

Machine-learning features powered by Optimizely

- Enable semantic search to return similar vocabulary results.

Generative AI features

N/A

Prerequisite Optimizely Software Services

- **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

N/A

Optimizely Options and Add-Ons

N/A

Integrations to Other Optimizely Software Services

N/A

Third-party Software and Platform Integrations

N/A

Regional Data Center

Available Hosting Regions:

Geography	Hosting Region
Australia	Australia East

Europe	North Europe
North America	East US
Middle East	United Arab Emirates North

Data is stored with multi-zones, which prevents data lost in case of power problems or other problems in one data center.

Included services

The following services are included in this Software Service.

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

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 product's editing and configuration tools 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 of de-activated by the Customer.

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

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

HIPAA ePHI enabled
As from 1 January 2025, Experimentation is available for a new Subscription as an ePHI-enabled Software Service. A BAA is required before Customer may process any ePHI in ePHI-enabled Software Service

AI features
Machine-learning features powered by Optimizely
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.

Generative AI features

Feature Experimentation

- Brainstorm ideas for flag variables and variations with Optimizely Opal (powered by Google Chat-Bison). This feature can be turned off by submitting a Support request.

Web Experimentation

- Use AI to generate copy suggestions (powered by GPT 3.5). This feature can be turned off by submitting a Support request.

Collaboration add-on

Administrators can toggle all generative AI features on or off for all users of an instance from the avatar > **Organization** > **Opal** tab.

- Bring your own AI (BYOAI): deploy your own LLM models or AI engines to generate hypotheses.
- Ideate with Optimizely Opal.
- Generate AI content (documented in Content Marketing Platform) for a task (powered by GPT 4.0).
- Text correction and editing (powered by GPT 4.0).

Prerequisite Optimizely Software Services

- 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 Segments in other Optimizely products. 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 Segments can be successfully used with additional Optimizely products.

APIs

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

Optimizely Options and Add-Ons

- **Warehouse-Native Scorecard** – Teams can analyze experiment performance, identify winning variations, and conduct deeper analyses on experiments within Warehouse-Native Scorecard 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

- **Collaboration** – Lets the Customer manage their experiment ideation, planning, and hypothesis-creation process. Capabilities included when Customer is using an eligible tier (among others):
  - Workflow management and approvals
    - o Create workflows and codify the experimentation 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

Integrations to Other Optimizely Software Services
(With URL links to other relevant Documentation)
- [Real-time Segments for Web Experimentation](#) – Lets Customers expand their audience targeting capabilities by using real-time segments from ODP audiences (via ODP or CDP Audience Sync) in their Web Experimentation experiments.
- [Real-time Segments for Feature Experimentation](#) – Lets Customers expand their audience targeting capabilities by using real-time segments 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](#)

Regional Data Center

Geography	Hosting Region
North America	US Central (Iowa)
North America	US East (South Carolina)

Included services
The following services are included in this Software Service.
- Onboarding
  - o Onboarding is described in the applicable Documentation of the relevant Software Service.
  - o Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – [Support Policy](#).

Personalization

General Overview

Personalization is an Optimizely software service designed to help Customers personalize the experiences they deliver through their Customer Properties. To use the products, the Customer first installs the applicable Optimizely Snippet on licensed Customer Properties, then uses the product's editing and configuration tools 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 of 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)
- Security and administrative control
- Audience builder
- Omni-channel event tracking capabilities
- Third-party analytics and audience integrations
- Campaign preview mode
- Reporting

AI features

Machine-learning features

- 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.

Generative AI features

Personalization

- Generate AI-powered suggested content in the Visual Editor for any existing copy on a page (powered by GPT 3.5). This feature can be turned off by submitting a Support request.

Collaboration add-on

Administrators can toggle all generative AI features on or off for all users of an instance from **the avatar > Organization > Opal** tab.

- Bring your own AI (BYOAI): deploy your own LLM models or AI engines to generate hypotheses.
- Ideate with Optimizely Opal.
- Text correction and editing (powered by GPT 4.0).

Prerequisite Optimizely Software Services

N/A

APIs
N/A

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
    - Create workflows and codify the optimization process
    - Assign approvers to have confidence that all experiments are well-designed
  - Test planning and collaboration
    - Document test design parameters using a structured template
    - Embed design files from Figma and InVision and directly annotate on screenshots
  - 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

Integrations to Other Optimizely Software Services
N/A

Third-party Software and Platform Integrations
N/A

Regional Data Center

Geography	Hosting Region
North America	US Central (Iowa)
North America	US East (South Carolina)

Included services
The following services are included in this Software Service.
- Onboarding
  - Onboarding is described in the applicable Documentation of the relevant Software Service.
  - Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – Support Policy.

Analytics

General Overview
Optimizely's Analytics enables businesses 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.

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 of 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
N/A

Prerequisite Optimizely Software Services
N/A

APIs
N/A

Optimizely Options and Add-Ons
N/A

Integrations to Other Optimizely Software Services
(With URL links to other relevant Documentation)

- Web Experimentation – Teams can use Experiment Scorecard 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 Experiment Scorecard 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

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](#)

Regional Data Center

Geography	Hosting Region
North America	US East

Included services

The following services are included in this Software Service.

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

![Optimizely One logo]

Data Platform

General Overview

Optimizely's Data Platform (ODP) lets Users harmonize their 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 of 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 Segmentation options
- CDP Audience Sync
- ODP predictions
- Reporting
- Integrations via the Connect Platform

AI features

Machine-learning features powered by Optimizely
- Prevent churn and win back customers 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.

Generative AI features
- Generate a summary of a customer's event history by using Optimizely Opal on the customer profile (powered by GPT 4.0)

ODP + Content Intelligence integration
- Enable generative AI topic enrichment for customer records (powered by GPT 3.5).

Prerequisite Optimizely Software Services

N/A

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 Segments in other Optimizely products. 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 Segments can be successfully used with additional Optimizely products.
- **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 Services
(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 Segments for Web Experimentation – Lets Customers expand their audience targeting capabilities by using real-time segments from ODP audiences in their Web Experimentation experiments.
- Real-time Segments for Feature Experimentation – Lets Customers expand their audience targeting capabilities by using real-time segments 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.

Regional Data Center
Available Hosting Regions:

Geography	Hosting Region
North America	East US
Europe	North Europe (Ireland)
Asia-Pacific	Australia

Included services
The following services are included in this Software Service.
- Onboarding
  - Onboarding is described in the applicable Documentation of the relevant Software Service.
  - Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – Support Policy.

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 of 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

Machine-learning features powered by Optimizely

- 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.

Generative AI features

N/A

Prerequisite Optimizely Software Services

N/A

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 Services

N/A

Third-party software and Platform Integrations

N/A

Regional Data Center

All integration and pre-production instances are hosted in North Europe. Available Production Hosting Regions dependant on customer location:

Geography	Hosting Region
Australia	Australia East
Europe	West Europe
North America	East US
North America	Canada East

Included services

The following services are included in this Software Service.

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

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 of 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

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

Machine-learning features powered by Optimizely

- 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.

Generative AI features
N/A

Prerequisite Optimizely Software Services
N/A

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 Services
N/A

Third-party software and Platform Integrations
N/A

Regional Data Center
All integration and pre-production instances are hosted in North Europe. Available Production Hosting Regions dependant on customer location:

Geography	Hosting Region
Australia	Australia East
Europe	West Europe
North America	East US
North America	Canada East

Included services
The following services are included in this Software Service.
- Onboarding
    - Onboarding is described in the applicable Documentation of the relevant Software Service.
    - Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – Support Policy.

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 of 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

Machine-learning features

Configured Commerce

- Use dynamic rules to auto-generate lists from custom properties and product attributes (powered by Optimizely).

Product Information Management (PIM) add-on

- Automatically translate product details (powered by Google Cloud Translate V3).

Generative AI features

Product Information Management (PIM) add-on

- Generate product descriptions (powered by GPT 3.5). Administrators can enable or disable this feature for specific product properties via the **Data Setup** > **Properties** page.

Prerequisite Optimizely Software Services

N/A

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 Services

- **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

Regional Data Center

Available Hosting Regions:

Geography	Hosting Region
Europe	North Europe
North America	East US

Included services

The following services are included in this Software Service.

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

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 of 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

Machine-learning features
N/A

Generative AI 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 Services

N/A

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 Services
(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

Regional Data Center

Geography	Hosting Region
Europe	Germany

Included Services
The following services are included in this Software Service.
- Onboarding
  - o Onboarding is described in the applicable Documentation of the relevant Software Service.
  - o Onboarding services are only available in the initial subscription term, unless otherwise stated in the Order Form.
- Support – Support Policy.

Glossary of Terms

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

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 Services.

Capability: is a described capability or Feature of a Software Service[2].

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.[3]

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 Services[4].

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.

Subscription: a Customer's Software Service 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.

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[2] Some capabilities may not be available in all countries
[3] Some features may not be available in all countries
[4] The Hosting Region may be identified in the Order Form upon Customer request

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 Services 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 Services.

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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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 Services 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		N/A	Initial version
Consolidation and updating of all prior-published stand-alone Service Descriptions).
Introduction of Common Terms, HIPAA, DORA and AI