

Optimizely SaaS CMS and Vercel Integration

Getting Started:

Requirements: Make sure you have following required thing:

- Requesting an Optimizely CMS instance using [Sign-up for the program](#)
- Ensure you have a GitHub account. You can create one [here](#)
- Ensuring you have (at least) a hobby plan account at Vercel or are comfortable creating one. You can create Vercel account [here](#).

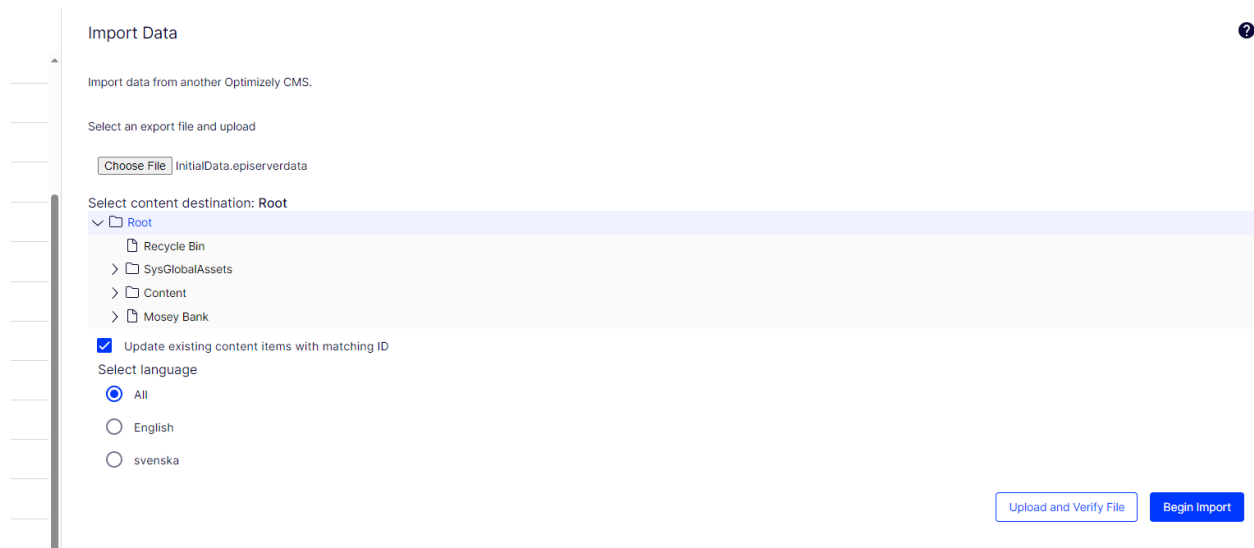
After signing up for the SaaS CMS instance and provisioning of the instance, you'll get an e-mail with the keys and instructions to activate your account.

Optimizely CMS Configuration

These instructions assume that you've just received the e-mail with login information for the CMS and are able to login to the fresh CMS instance.

1. Import the content pack

- [Download the file](#) to your local disk, to a place where you can access it.
- Login to the CMS and navigate to "Settings" (cog icon on the left-hand side) - and then go "Import data", under the heading "Tools".
- Import the settings according to the screenshot here



The screenshot shows the 'Import Data' interface in the Optimizely CMS. The page title is 'Import Data' with a help icon. Below the title, it says 'Import data from another Optimizely CMS.' There is a section 'Select an export file and upload' with a 'Choose File' button and the filename 'InitialData.episerverdata'. Below that, it says 'Select content destination: Root' and shows a tree view with folders: 'Recycle Bin', 'SysGlobalAssets', 'Content', and 'Mosey Bank'. There is a checkbox 'Update existing content items with matching ID' which is checked. Below that, it says 'Select language' and has three radio buttons: 'All' (selected), 'English', and 'svenska'. At the bottom right, there are two buttons: 'Upload and Verify File' and 'Begin Import'.

2. Configure the channel

With the content now imported, the next step is to do the initial configuration of the channel. This will allow the website to connect to the content and render it.

- Navigate to "Settings" (cog icon on the left-hand side) - and then go to "Manage Websites" under "Config"
- Click on "Create website" to create a new channel definition
- Fill out the form as follows:

Field	Instructions
Name	The name for the channel, use "Mosey Bank" or a name you've selected yourself
URL	Copy the URL from your browser and remove everything after the domain. So https://example.cms.optimizely.com/ui/EPIServer.Cms.UI/ becomes https://example.cms.optimizely.com/
Start Page	Select the start page of the channel, that is "Mosey Bank" for the included content pack
Use site-specific assets	Checking this option will allow you to store assets at a channel level.

Settings associated with the site.

Name

URL

Start page

✓ Root

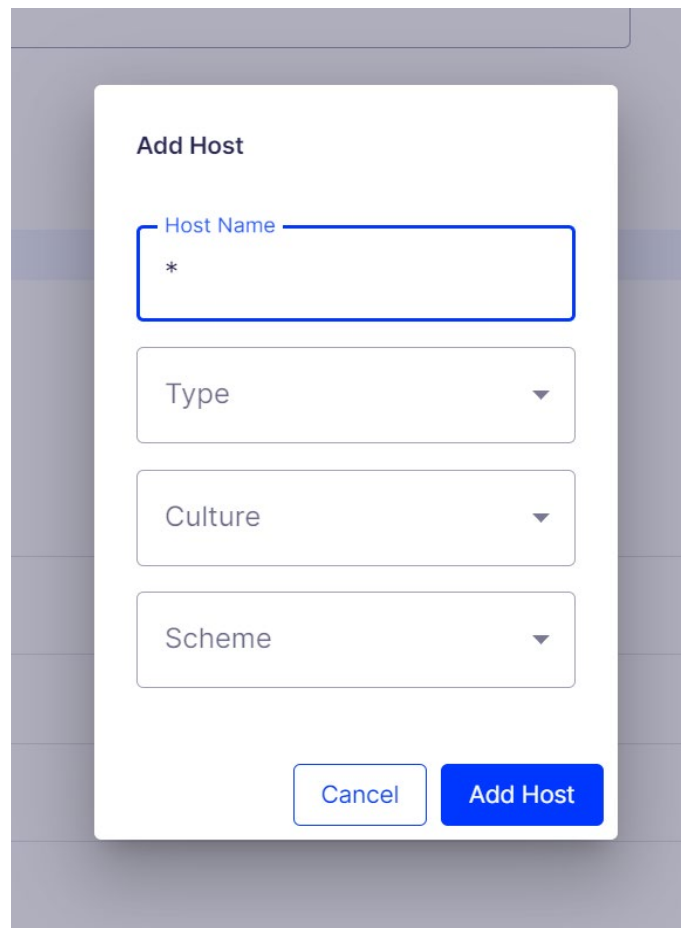
Recycle Bin

> Mosey Bank

Use site-specific assets

- Now click on "Create website", you should go back to the list of sites.
- Click on the **Name** of the website you've just created, you should now see same form again, with the settings you've just created **and** the first host defined.
- Click on the "Add Host" button and create the following settings:

FIELD	INSTRUCTION
HOST NAME	Put in a single asterisk (*)
TYPE	Keep this field empty
CULTURE	Keep this field empty
SCHEME	Keep this field empty



Add Host

Host Name

Type

Culture

Scheme

- Click on "Add Host" to add this host to the list
- Click on "Save Website" to update the website definition

3. Configure the languages

The last step is to have the available languages match the languages in the content pack.

- Navigate to "Settings" (cog icon on the left-hand side) - and then go to "Manage Website Languages" under "Config"
- Using the "triple dot" icon on the left of each item, disable Swedish ("Svenska") and enable Dutch ("Nederlands") and Flemish ("Nederlands (België)")

After configuration the list should look like:

Manage Website Languages ?

Define the languages that should be available to visitors on your website.

[Add Languages](#)

Name	Language Code	Enabled	Sort Index	
svenska	sv		80	⋮
suomi	fi		110	⋮
português (Brasil)	pt-BR		140	⋮
norsk	no		90	⋮
français	fr		60	⋮
español	es		70	⋮
dansk	da		100	⋮
Nederlands (België)	nl-BE	✓	130	⋮
Nederlands	nl	✓	120	⋮
English (United Kingdom)	en-GB		20	⋮
English (South Africa)	en-ZA		40	⋮
English (New Zealand)	en-NZ		30	⋮
English	en	✓	10	⋮
Deutsch	de		50	⋮

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4. Update content in Optimizely Graph

To make sure the content upload and configuration changes from the previous steps are reflected in Optimizely Graph, take the following steps:

- Navigate to "Settings" (cog icon on the left-hand side) - and then go to "Scheduled Jobs" under "Scheduled Jobs"
- Filter the job-list for "Graph" and click the "Optimizely Graph content synchronization job"
- Click the "Start" button on the "Details" page that has just been opened, the status should change to "Running", with status updates next to it.
- Once the status returns to "IDLE" the synchronization process has completed.

The content will now be reflected correctly by Optimizely Graph

5. Update the Header/Footer configuration

The header and footer are referenced by the identifier of the website/channel, this identifier will only be created in step 2 above. These steps ensure the header & footer configuration can be found by the frontend:

1. Obtain the channel identifier:

- Navigate to "Settings" (cog icon on the left-hand side) - and then go to "Manage Websites" under "Config"
- Click on the **Name** of the website you've created as part of step 2 above
- Copy the value of the "ID" field (Which looks like: xxxxxxxx-xxxx-xxxx-xxxx-xxxxxxxxxxxx)

2. Make the "Multi-Channel Content" visible:

- Navigate to "Edit" (page with pen icon on the left-hand side)
- Open the "Navigation pane" (tree icon, left-hand side, near the top of the page) and pin it (pin icon at the right top of the opened pane)
- Click the "Settings" icon of the "Navigation pane" (right top, left of "pin") and click "Add Gadgets"
- Search for "Multi" and click "Multi-Channel Content"
- Scroll within the "Navigation pane" to make the "Multi-Channel Content" visible

3. Apply the configuration:

- Within the "Multi-Channel Content", navigate to `Content > Channel configuration > Web`
- Click on `Website Footer`; switch to "All properties" (bullet-list icon at the right top of the screen)
- Go to the "Settings" tab
- Paste identifier copied above, into the Channel ID field.
- At the right top a marker for the changed content should appear, next to the "Publish?" menu, open the menu and click "Publish changes"
- Within the "Omni-Channel Content", click `Website Header`
- Go to the "Settings" tab
- Paste identifier copied above, into the Channel ID field.
- At the right top a marker for the changed content should appear, next to the "Publish?" menu, open the menu and click "Publish changes"

Deploying & Configuring

After you've completed the CMS configuration instructions and collected the needed information, click the ["Deploy to vercel"](#) button below, to deploy this site to your Vercel Account

Environment variable	Instruction
DXP_URL	The URL where the Optimizely CMS can be reached by the build process; for example: <code>https://example.cms.optimizely.com/</code>
OPTIMIZEY_CONTENTGRAPH_SECRET	The Content Graph Secret can be made visible on the CMS Dashboard, within the "Render Content" section.
OPTIMIZEY_CONTENTGRAPH_APP_KEY	The Content Graph App key, which is shown on the CMS Dashboard, within the "Render Content" section.

**OPTIMIZEY_CONTENTGRAPH_SINGLE_KEY**

The Content Graph Single key , which is shown on the CMS Dashboard, within the "Render Content" section.

When the deployment has succeeded, the following steps are needed to enable "On Page Editing" or "In Context Editing".

[Enable on-page / in context editing](#)

Further documentation

- [Local development](#)
- [CMS Configuration](#)
- [Enable on-page / in context editing](#)
- [Supported environment variables](#)
- [Custom demo building](#)
- [General solution description](#)