The Optimizely OpX App for Salesforce

The Optimizely Operations Experimentation for Salesforce — "OpX" for short — sits atop the Optimizely Data and Attribution for Salesforce app (DNA) and lets you handle experimentation and feature management directly in Salesforce. With it, you can improve your Salesforce workflow, reduce operational costs, reduce operational risk, grow revenue, and unlock more value from Salesforce.

Salesforce admins and Salesforce Apex developers can use OpX to try multiple versions of a layout, process, or screen flow to determine which version best improves their team operations and customer outcomes. They can also use OpX for feature management, helping reduce the risk in deploying changes to mission-critical Salesforce components. Specifically, this app will help you with:

- Lightning page layout experimentation
- Flow Builder experimentation
- Process Builder experimentation
- Custom backend process automation and experimentation (excluding bulk back-end processes)
- Feature management

The OpX app enables both declarative and programmatic experimentation, but this guide focuses more on declarative experimentation. To explore programmatic experimentation in more detail, please contact Optimizely.

Building an experiment with OpX is a six-step process:

1. Launch the Optimizely App.
2. Open an existing project record, or create and activate a new project record.
3. Create a new experiment record.
4. Define your metrics.
5. Create variations and activate your experiment.

6. QA your experiment.

An OpX experiment has many things in common with an Optimizely experiment, including its use of audiences and its Results page. You can also use OpX to manage feature deployment. However, there are also many differences between the two, and we recommend you read the OpX documentation thoroughly before proceeding.

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**Install the OpX app**

This app is powered using Optimizely Agent, which effectively serves as an Apex SDK in Salesforce. There is no need to install a snippet of code—everything you need is included in the Optimizely packages you install.

The OpX app is an extension of the DNA App, so you'll need to install that first. Follow these steps to get OpX installed and configured:

1. Install the Data and Attribution App.

2. Install the unmanaged packages (recommended, optional). Optimizely will provide the installation URL for each unmanaged package (Lightning Page Builder experiment and Flow Builder experiment).

3. Configure the unmanaged packages. The Lightning Page Builder experiment package doesn't require special configuration. For the Flow Builder experiment package, you'll need to assign a permission to Salesforce users (e.g. call center agents) who may be included in a screen flow experiment or feature rollout managed using Optimizely's app. To do this, follow these steps:
   a. Navigate to Setup > Permission Sets > Optimizely Run Flows > System Permissions > Edit
   b. Look for Run Flows and click Enable, then Save
   c. From Manage Assignments, click Add Assignments
   d. Add any users who will need to run flows
   e. Click Assign

4. Request that Optimizely enable operations experimentation for the appropriate organization.

5. Ensure you have Salesforce admin and Optimizely app admin privileges.

Once you’ve completed these steps, you can open the app by opening Salesforce App Launcher and selecting the Optimizely app.
Salesforce User Permissions

System admins should already have all necessary permissions to use the features enabled by the OpX app.

To enable them for other users, the list below describes the user permissions that can be provisioned to a profile, or through a permission set, via the system permissions. Some of these permissions may require other permissions to be enabled as well:

• User permissions needed for Page Builder and Flow Builder Lightning Web component configuration via the Lightning Record page:
  ◦ To create and save Lightning pages in the Lightning app builder: Customize Application
  ◦ To view Lightning pages in the Lightning app builder: View Setup and Configuration
  ◦ See the Salesforce documentation for additional information.

• User permissions needed for Flow Builder and Process Builders
  ◦ To open, edit, or create a flow in Flow Builder: Manage Flow. See the Salesforce documentation for additional information.
  ◦ To create, edit, or view Processes: Manage Flow AND View All Data. See the Salesforce documentation for additional information.

• User permissions needed to run flows:
  ◦ To run a Flow: Run Flows. See the Salesforce documentation for additional information.