

Features and onboarding guide



Drive your sales online with our powerful solutions

Designed specifically to meet the current and future needs of your most demanding customer, INTELLISELL will help increase your sales and deliver a rounded customer experience. Whether you're new to trading online or you want to develop your current eCommerce strategy, we have various packages available and will work with you to select the best option to maximise your online investment.

With comprehensive functionality as standard, INTELLISELL offers you the same great features often only associated with high-end, bespoke eCommerce solutions.



INTELLISELL Popular

Be in the driving seat when it comes to selling

As the name says, our most POPULAR package gives you a fantastic basis to launch your eCommerce business. Functionally rich with all of the components you'd expect from a modern B2B eCommerce website, INTELLISELL is hosted in our premium, secure hosting environment giving you total peace of mind. Consistent branding and responsive design INTELLISELL puts you in the driving seat when it comes to selling online. Our POPULAR package includes the development, onboarding, training and support of your new website.

INTELLISELL Super

Extended reports and additional onboarding support

INTELLISELL SUPER is an all-encompassing package designed to give you even more. With B2C capability, extended reports and additional onboarding support, SUPER maximises your INTELLISELL investment. You'll still get all of the great functionality contained within the POPULAR package, but with increased technical support and training.

INTELLISELL Ultimate

Create a unique eCommerce experience for your business

If you are looking for a Sage integrated solution, INTELLISELL ULTIMATE gives you access to the team of highly skilled developers to assist with your eCommerce vision. This customised development isn't for the faint hearted and requires planning and control. We can work with you to create a unique eCommerce experience for your business and support your roll-out and go live.

INTELLISELL Boost

Additional support, an added extra... look no further

BOOST is designed for organisations looking for additional support or an added extra when implementing INTELLISELL eCommerce. Whether you are looking for additional training, more help with your sales analysis via bespoke reporting or you want to extend the functionality in a particular area, we can help you get the most from your website. Our INTELLISELL experts can work with you to extend functionality and create bespoke reports or training.

INTELLISELL Components	Popular	Super	Ultimate
Data Extraction and Order Imports			
Secure, non-invasive real time integration	●	●	●
Automated, defined data extraction	●	●	●
Orders posted on checkout completion	●	●	●
Payment gateway integration	●	●	●
eProcurement software application integration	—	—	●
Choice of order import processes	●	●	●
Multi-language	—	●	●
Third party digital marketing integration	—	●	●
eCommerce Technology			
Secure cloud storage	●	●	●
Communication via INTELLISELL APIs	●	●	●
Integrated payment options	●	●	●
Sage shipping integration	●	●	●
Package tracking via designated courier	—	—	●

INTELLISELL Components	Popular	Super	Ultimate
Interface and Design			
Responsive design	●	●	●
Consistent brand identity	●	●	●
Homepage design	●	●	●
Blog integration	●	●	●
Editable generic policy page	2 Pages	4 Pages	8 Pages
Cross sell and upsell	●	●	●
Promotions	●	●	●
High-res image and video	●	●	●
Customer Account Capability			
Account manager details	●	●	●
Credit status	●	●	●
Outstanding invoices	●	●	●
Product pricing	●	●	●
Purchase history and reporting	●	●	●
Upload order	●	●	●
Saved baskets	●	●	●
Wish list	●	●	●
Catalogue downloads	●	●	●

INTELLISELL Components	Popular	Super	Ultimate
Customer Account Capability			
Multi-way product search	●	●	●
Quickbuy	●	●	●
Stock and expected stock date	●	●	●
RRP and unit price	●	●	●
Quantity price breaks	●	●	●
Product variations	●	●	●
Associated and recommended products	●	●	●
Promotions	●	●	●
Frequently purchased products	●	●	●
Pre order product	●	●	●
Apply discount code Review basket	●	●	●
Shipping selection	●	●	●
Printable order confirmations	●	●	●
Track order status	●	●	●
View and print account reports	●	●	●

INTELLISELL Components	Popular	Super	Ultimate
Sales and administrative capability			
Access customer accounts	●	●	●
Place orders against a customer in the field	●	●	●
Use in house to process orders	●	●	●
Allow customers to self serve	●	●	●
Administration, security and site analysis			
Manage user access	●	●	●
Manage generic content	●	●	●
Non Sage data bulk upload	—	●	●
End user behavioural analysis – time spent on page, pages visited, pending checkouts	—	●	●
Standard report set up	●	●	●
Bespoke report set up	—	●	●
SEO architecture	●	●	●

INTELLISELL Boost	Bespoke development	Integration/API package only	Integration only
The Boost package offers additional support and functionality to help you get the most from your website.	●	●	●

Onboarding

“We regularly receive orders at weekends and evenings which we would never have done before.”

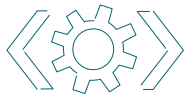
Intro 2020

Onboarding with INTELLISELL

From your first interaction with us, we want to be as efficient and easy to deal with as possible. When you agree to work with INTELLISELL we commit to getting you and your new website up and running as quickly as possible. Communication is key to this so we will appoint your Account Manager alongside your dedicated Consultant, working together to act as a project management team.

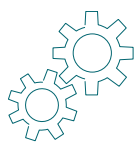
Onboarding is a one off set up of your INTELLISELL site and includes a wide range of tasks performed by INTELLISELL. Onboarding also includes the very important element of training you and your team to ensure high user adoption from day one.

The four pillars of onboarding



Setup

The nuts and bolts of your solution. We will build your branded website and integrate it to your Sage solution using the familiar logic of your products and pricing in Sage. Features and functions will be tested and pages configured to your specification. The INTELLISELL architecture is designed to provide both user and SEO technology with intuitive navigation and INTELLISELL allows you to take advantage of the standard features in Google Analytics. INTELLISELL is hosted within our powerful cloud platform at one of the leading UK data centres to offer you upmost security and resiliency.



Training

Here at INTELLISELL we believe that how you learn is as important as what you learn. Everyone learns differently and at a different pace, which is why we offer a training package that is flexible to you. You'll get access to great online resources as well as structured one to many formal classroom sessions around key functionality or topics. These online workshops are flexible, scheduled to suit your needs, easy to arrange, recorded and designed to give you and your team the tools to navigate and edit your new website. But we also recognise that you may have more questions as you begin to stretch the legs of the website. Online resources can offer further guidance 24/7, but if you're looking for a more hands on, face to face approach we can create a tailored training programme to your needs with practical help on the live website.



Account Management

Two heads are better than one. With a dedicated account manager, you'll have access to a member of the INTELLISELL team when you need them most. Your Account Manager is there as the first point of contact for all general enquiries but is primarily focussed on making sure you maximise your usage of the site and hit your objectives. If you'd like to launch a new product into a new territory, if you want to begin to create more opportunities through cross sell or upsell or you have a new corporate brand, your Account Manager will work with you to understand your new objectives and suggest a course of action to make sure that INTELLISELL continues to deliver.



Support

Care when you need it most, included in the price. Included in your monthly fee is access to our support services. Online and via the phone and webchat, our friendly experts Monday to Friday 8am until 6pm. The team of experts are here to help with any software or hosting related issue and can point you in the right direction for the resources you may need for additional training. Backed by a wider Sage support application and technical team from a leading Sage Business Partner, INTELLISELL support services can offer you and your team a great all-round experience.

Features of INTELLISELL onboarding explained

Feature	Popular	Super	Ultimate	
Project Manager	●	●	●	With a dedicated Project Manager appointed you will have additional support right through to go live.
Account Manager	●	●	●	Your Account Manager will ensure a smooth transition from new customer into happy long term customer.
Consistent brand implementation	●	●	●	Development of the website in line with your corporate brand guidelines.
Integration to your Sage solution	●	●	●	Real time integration to your Sage 200, Sage 1000/500 or Sage X3 system.
Implementation of INTELLISELL platform	●	●	●	Please see the extensive list of features in INTELLISELL.
Secure hosting	●	●	●	INTELLISELL is delivered on the market leading CPiO Cloud Hosted Managed Services platform, ensuring highest levels of tolerance and uptime.
SEO Architecture	●	●	●	Built within an industry-standard framework to deliver technical optimisation.
Payment gateway integration	●	●	●	Integration with SagePay, WorldPay or Secure Trading as standard. Bespoke integration available in ULTIMATE package.
Sage shipping and tracking integration	●	●	●	Integration with Sage as standard. Non-sage shipping and tracking rules are available in SUPER package.
Online end user training	●	●	●	Training on the set-up, administration and use of features delivered via Microsoft Teams and help files.
Onsite training	—	●	●	Boost your training with onsite, hands on training with your users, available with our SUPER and ULTIMATE packages.
Standard report set up	●	●	●	Account Summary, Outstanding Items and Back Order report delivered as standard.
Bespoke reporting	—	●	●	Available in SUPER or ULTIMATE packages.
Dedicated support set up	●	●	●	Ongoing support of your INTELLISELL solution via a dedicated hotline open from Monday to Friday 8am to 6pm UK time and via online chat.
Technical Support	—	●	●	Dedicated technical assistance for cross team collaboration.

Intellisell eCommerce has been developed by CPiO since 2007. It provides seamless integration with Sage 200cloud, Sage X3 and Sage 1000 making it easy for your customers to buy your products and services online without the need to increase staff costs or administration.

Based in the West Midlands, CPiO is a privately owned company that provides integrated business solutions covering all aspects of the enterprise - such as finance, manufacturing, distribution, CRM, business intelligence and eCommerce.

CPiO is part of the Waterdale Group of Companies.



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