

IntelliLink Data Analysis Guide

**PAYMENT
SOLUTIONS**

IntelliLink Data Analysis Guide



For all support related inquiries, contact our Account Management Support team from 8:00 a.m.–6:00 p.m. CST, Monday–Friday at:

Phone: 877.346.1412

Email: CommercialCards@htlf.com

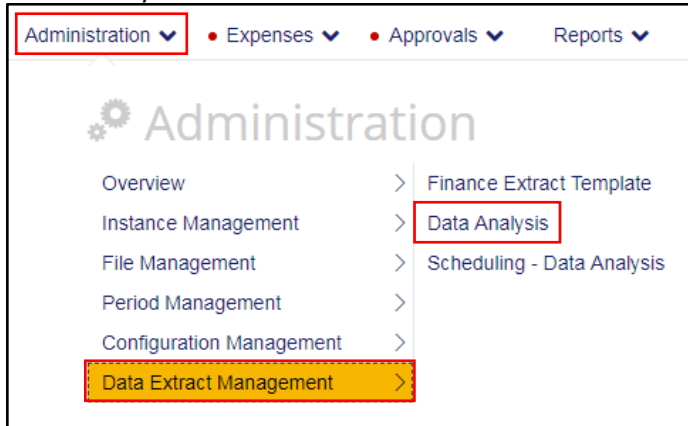
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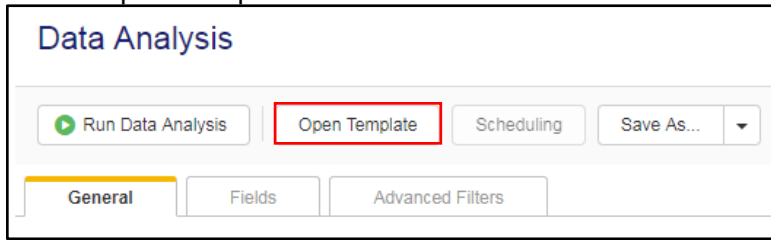
INTELLILINK DATA ANALYSIS

RUN A DATA ANALYSIS

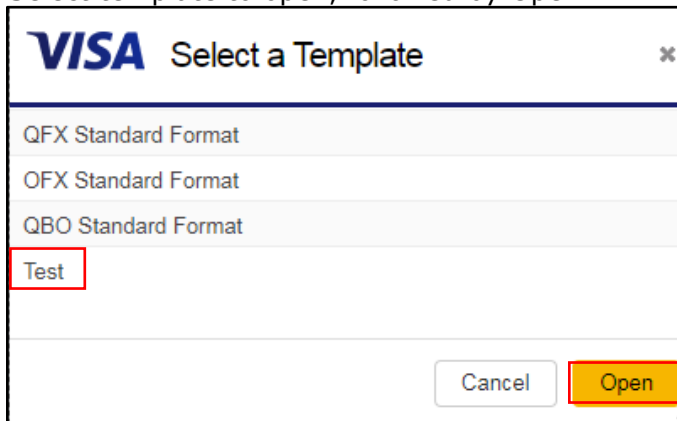
Step 1: Navigate through Administration > Data Extract Management > Data Analysis



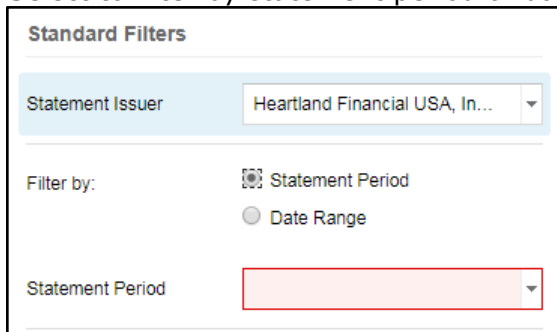
Step 2: Select Open Template in the tool bar.



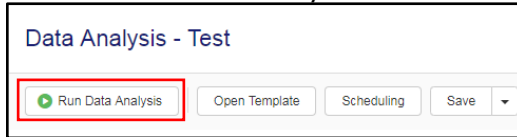
Step 3: Select template to open, followed by Open.



Step 4: Select to filter by statement period or date range.



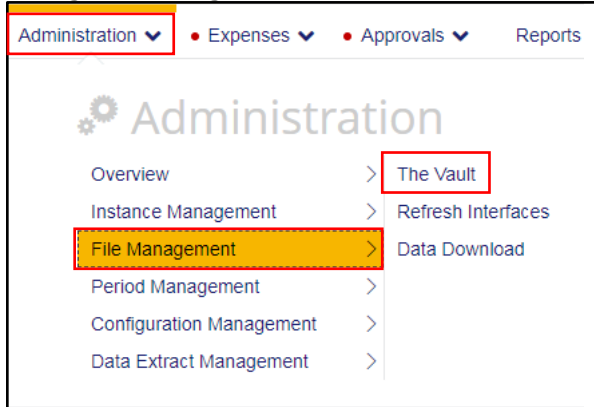
Step 5: Choose Run Data Analysis from the toolbar.



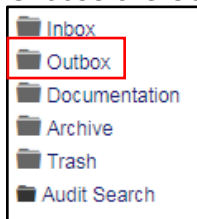
The file will be placed in vault. Follow the below to download.

DOWNLOAD A DATA ANALYSIS




Step 1: Navigate through Administration > File Management > The Vault



Step 2: Choose the Outbox folder.

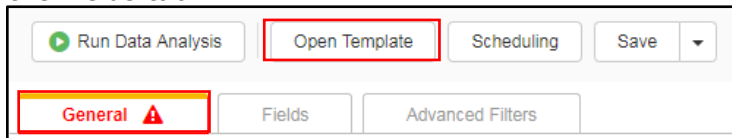


Step 3: Download the file by selecting the icon to the right.

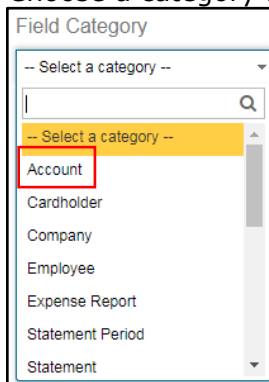
File Name	Size KB	Date Stamp	
Test-20190501_184657.xlsx	5	05/01/2019 13:47:05	  

MODIFY A DATA ANALYSIS

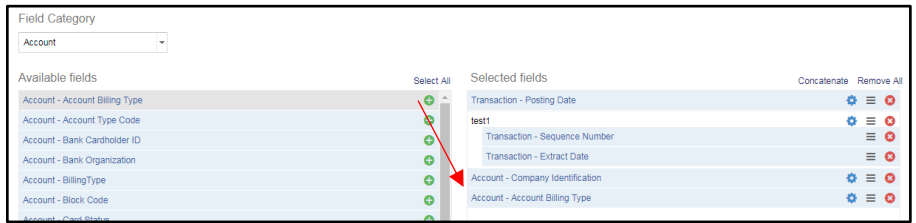
Step 1: Select Open Template and choose analysis to modify, and select the Fields tab.



Step 2: Choose a category in the dropdown.

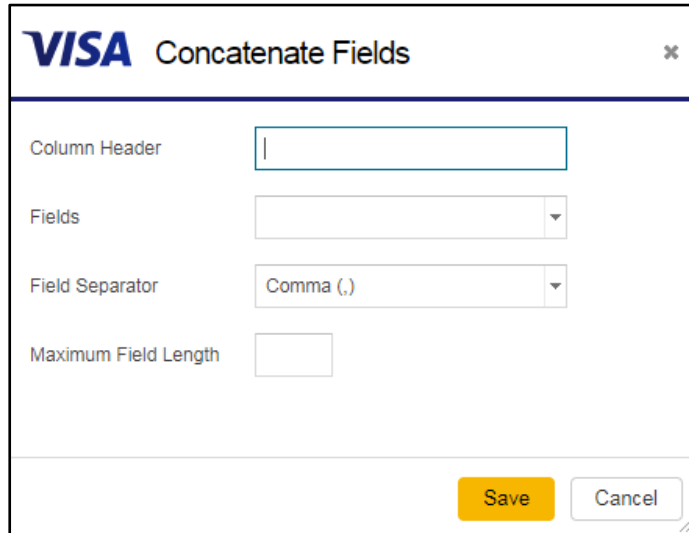


Step 3: Add items to the Selected fields by clicking the field in Available fields.



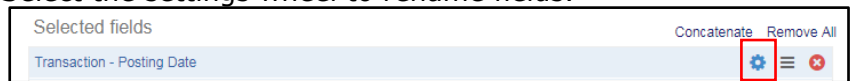
Click and drag to rearrange selected fields.

Step 4: To concatenate fields:

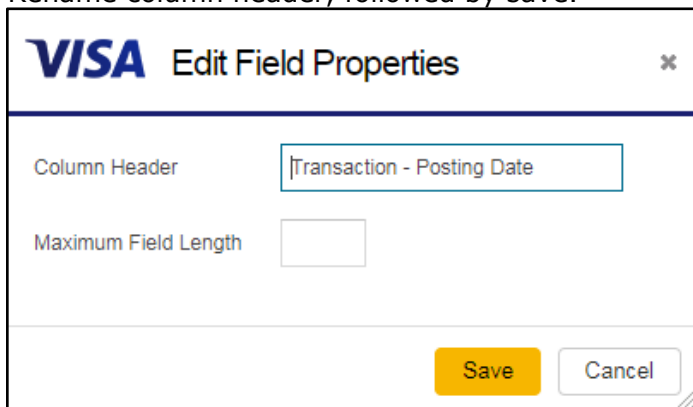


- Select Concatenate
- Name the column
- Choose fields to concatenate
- Choose separator
- Enter maximum field length (optional)
- Save

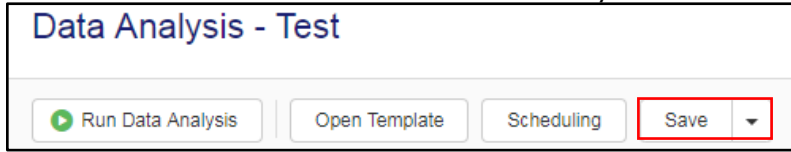
Step 5: Select the settings wheel to rename fields.



Step 6: Rename column header, followed by save.

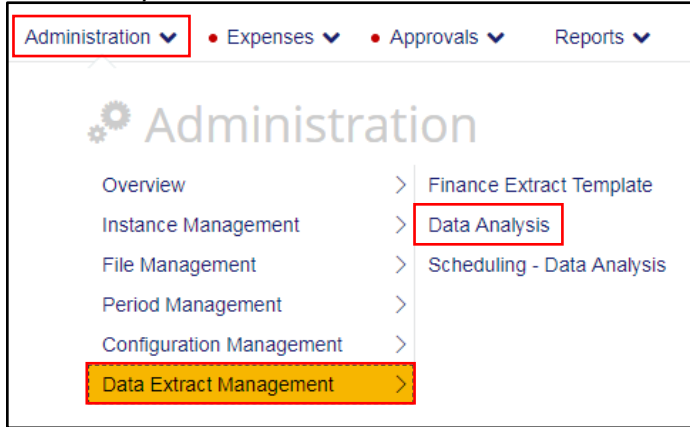


Step 7: Select Save in the toolbar to save data analysis.

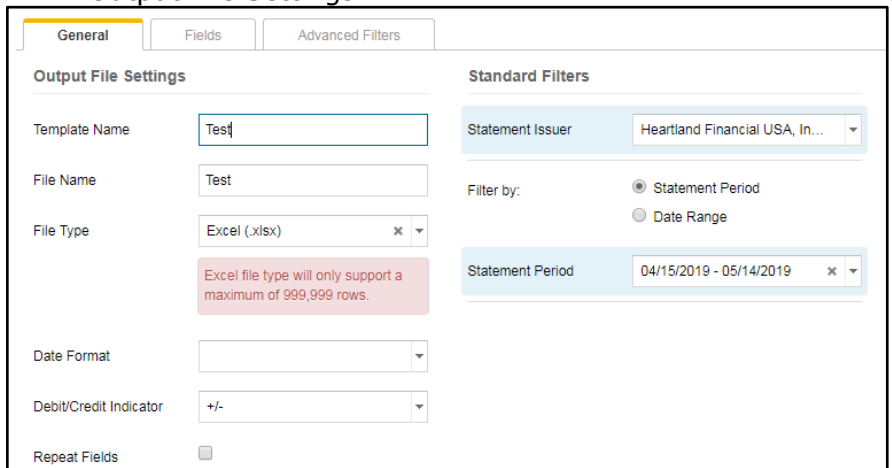


CREATE A NEW DATA ANALYSIS

Step 1: Navigate through Administration > Data Extract Management > Data Analysis



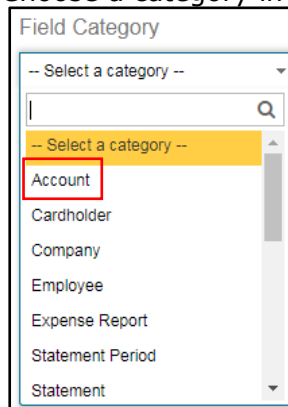
Step 2: Fill in Output File Settings.



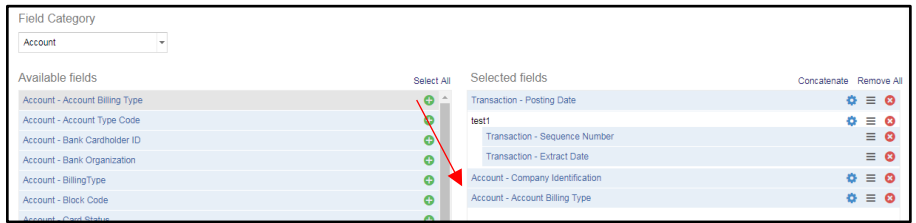
Step 3: Select the Fields tab to choose information to include in the file.



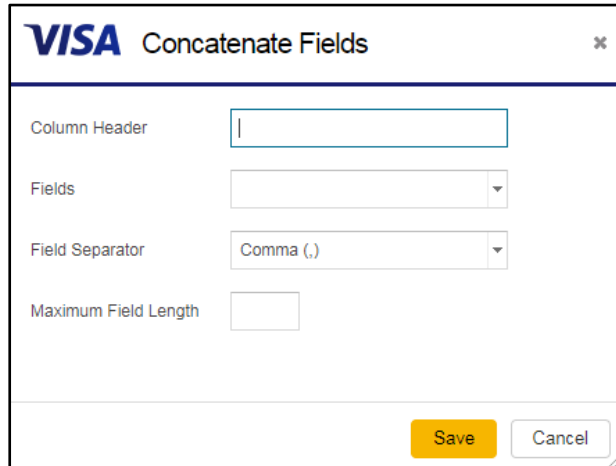
Step 4: Choose a category in the dropdown.



Step 5: Add items to the Selected fields by clicking the field in Available fields.



Step 6: Click and drag to rearrange selected fields. To concatenate fields:

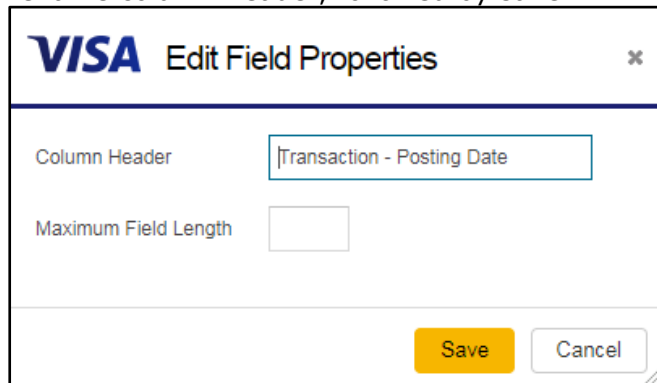


- Select Concatenate
- Name the column
- Choose fields to concatenate
- Choose separator
- Enter maximum field length (optional)
- Save

Step 7: Select the settings wheel to rename fields.



Step 8: Rename column header, followed by save.



Step 9: Select Save in the toolbar to save data analysis.

