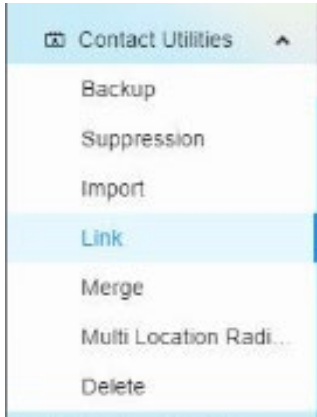
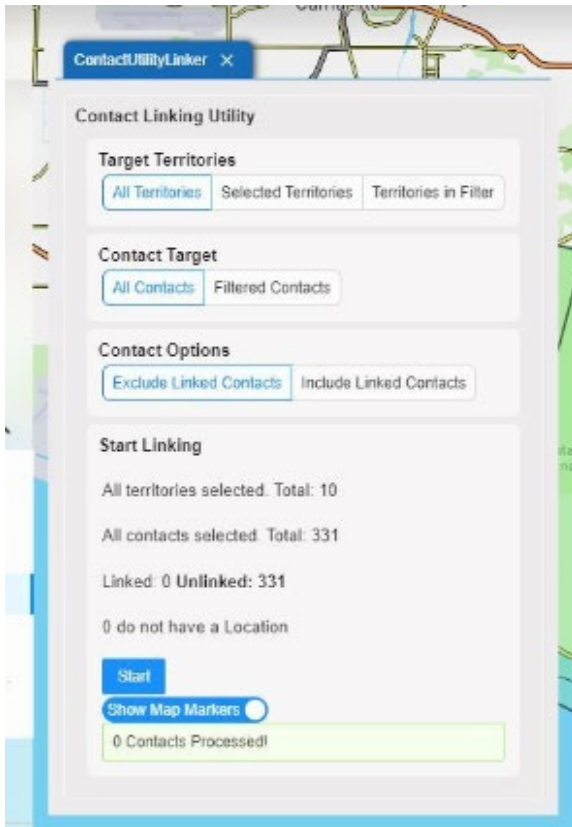


The Contact Utility Link Tool will link Contacts to Territories based on selected criteria.

- Click **Contact Utilities** (the Contact Utilities menu expands)
- Click **Link**

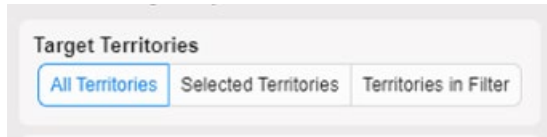


- The **Contact Utility Linker** opens



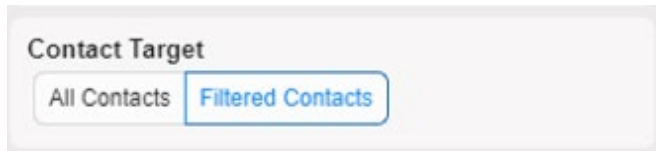
TARGET TERRITORIES

- Select which territories to use for the linking
 - o **All Territories:** will process all Territories
 - o **Selected Territories:** will process territories that have been currently selected
 - o **Territories in Filter:** will process territories that are in the current filter (from within the Territory window or Territory drawer)



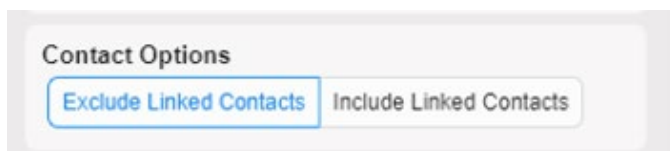
CONTACT TARGET

- Select which Contacts to use for the linking
 - o **All Contacts:** will process all Contacts
 - o **Filtered Contacts:** will process Contacts that are in the current filter (from within the Contact Table window or Contact drawer)



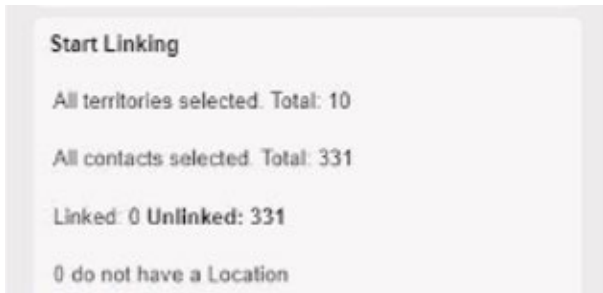
CONTACT OPTIONS

- Select Contacts to include or exclude
 - o **Exclude Linked Contacts:** will ignore Contacts already linked to territories and not process them for linking
 - o **Include Linked Contacts:** will link all Contacts, re-linking Contacts already linked to territories



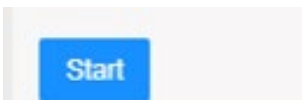
START LINKING

- **All territories selected:** displays total number of territories that have been selected to be linked
- **All Contacts selected:** displays total number of Contacts that have been selected to be linked
- **Linked:** displays the number of Contacts that are linked to territories
- **Unlinked:** displays the number of Contacts that are not linked to territories
- **# do not have a Location:** displays the number of Contacts that are missing GPS coordinates



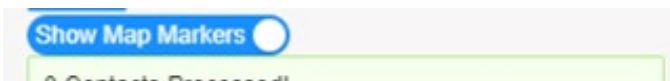
START

- Click Start to begin the linking process



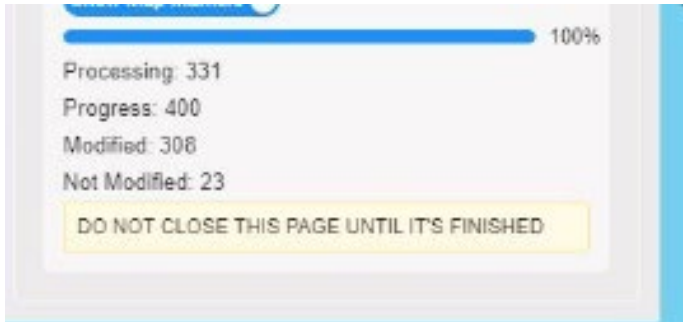
SHOW MAP MARKERS

- Click the **Show Map Markers** to toggle map markers on and off. Blue indicates that map markers will be displayed.



OUTPUT/RESULTS:

- **Percentage Bar:** Shows progress.
- **Processing:** Lists the number of records as they are processed
- **Progress:** Lists the record number in progress
- **Modified:** Lists the number of Contacts that have been modified
- **Not Modified:** Lists the number of Contacts that were *not* modified likely due to not being located within the territory boundaries.
- ***DO NOT CLOSE THE PAGE UNTIL THE LINKING HAS COMPLETED/IS FINISHED!***
When percentage/progress bar reaches 100%, the linking process is complete.



[End of document]