Geocoding Workflow Plugin

Workflow Plugins · https://www.easyterritory.com/documentation/dynamics-365-managed-solution/workflow-plugins/crm-geocoding-workflow-activity-plugin/

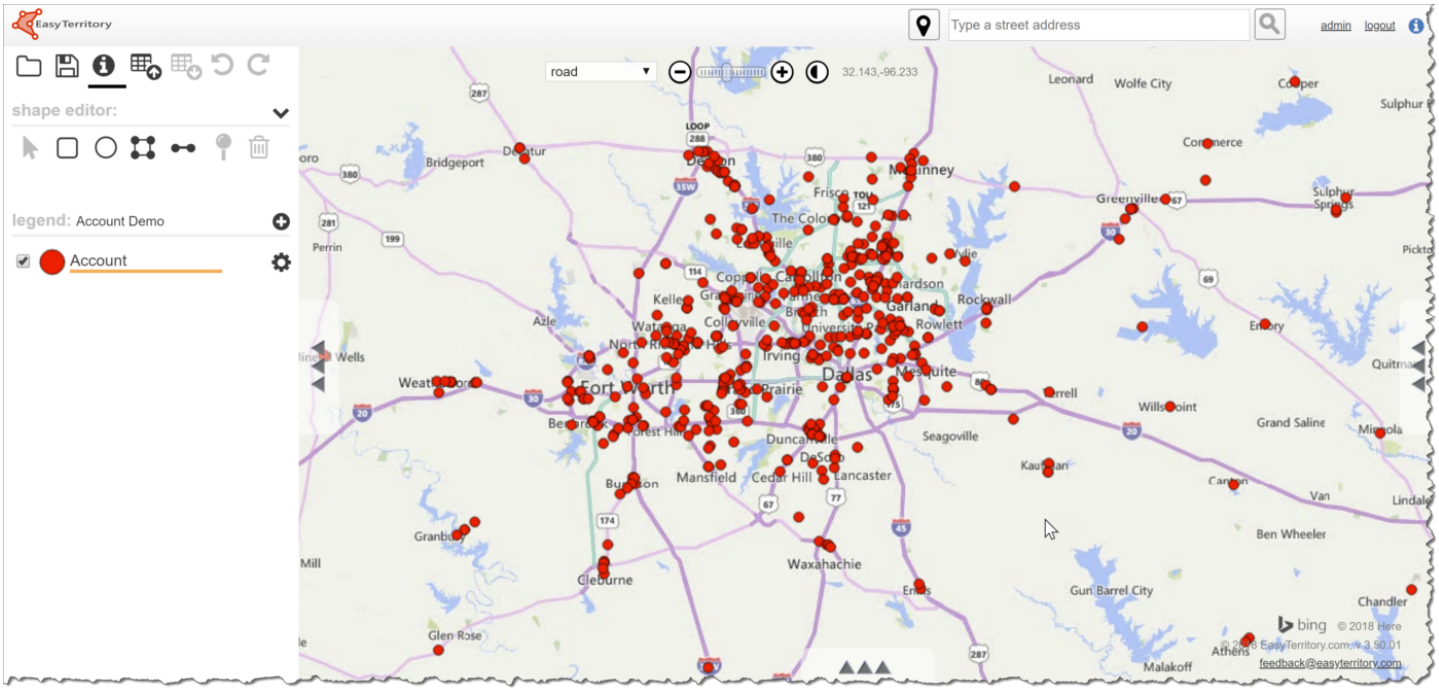
Geocoding is the process of determining latitude and longitude coordinates from an address. In Dynamics 365, having latitude and longitude set on records such as **Leads** or **Accounts** is required for territory management and Advanced Find mapping in EasyTerritory.

The **Geocoding Workflow Plugin** for Dynamics 365 is a workflow activity that reads address values from a record and returns latitude and longitude values. These values can then be used to update the record in a subsequent workflow step.

Typically, this workflow is configured to trigger when:

- A new record is created, or
- Address information on an existing record changes

EasyTerritory leverages either **Microsoft Bing Maps** or **Azure Maps** for geocoding. Both services provide highly accurate, global geocoding results.



Setup Steps

Step 1. Install the EasyTerritory Managed Solution

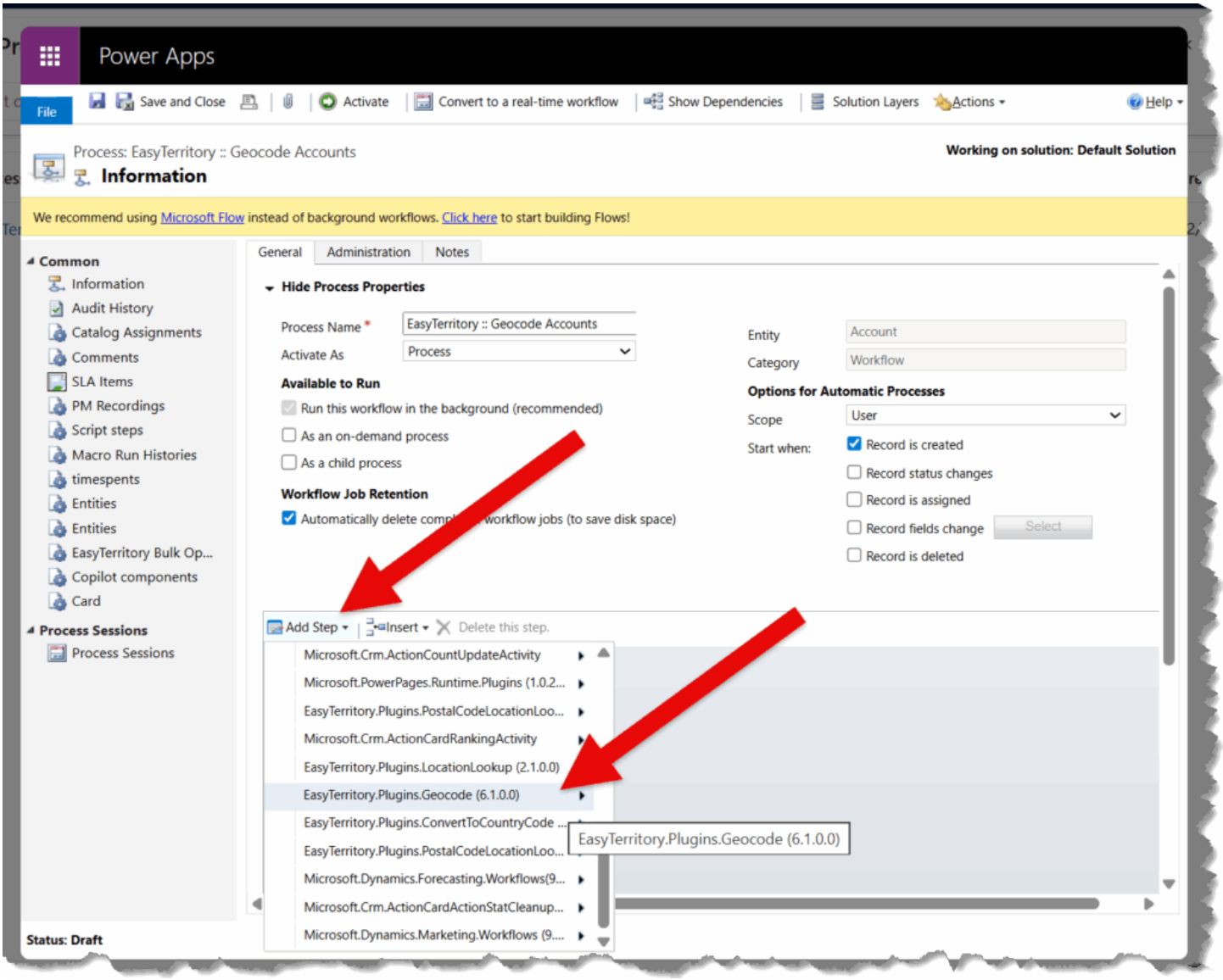
Install the **EasyTerritory managed solution** into Dynamics 365.

You can obtain the solution from the **Microsoft Marketplace**.

Step 2. Create a New Workflow

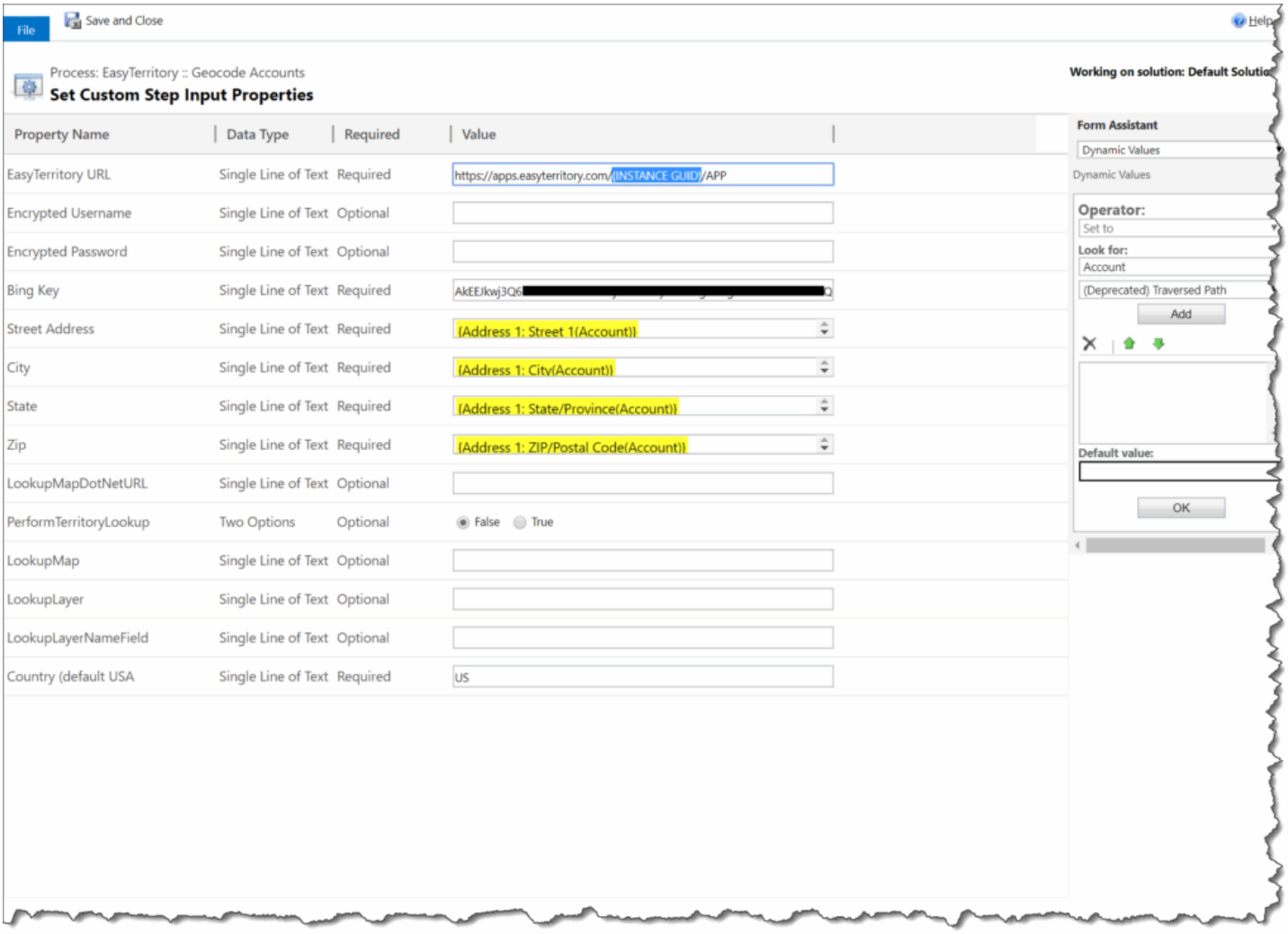
Once the EasyTerritory managed solution is installed:

1. Create a new **Workflow** in Dynamics 365.
2. Add the **Geocoding** workflow activity to the process.



Step 3. Configure the Geocoding Step

Configure the properties on the **Geocode** step as follows:



-
- **EasyTerritory URL**

  The URL to your EasyTerritory instance.

  Example: https://apps.www.easyterritory.com/{INSTANCE_GUID}/{INSTANCE_TYPE}

- **Bing Key**

  A valid **Bing Maps** or **Azure Maps** key.

  For more details on obtaining a key, refer to the Microsoft documentation.

- **Street Address**

  Use the Form Assistant to select the address field.

  Example: `address1_street1`

- **City**

  Example: `address1_city`

- **State**

  Example: `address1_stateprovince`

- **Zip**

  Example: `address1_postalcode`

- **Country**

  Defaults to `US`, or use the Form Assistant to select a field.

  Example: `address1_country`

Deprecated Configuration Properties

The following properties are **deprecated** and should not be used in new workflows:

- Encrypted Username
- Encrypted Password
- LookupMap
- LookupLayer
- LookupLayerNameField

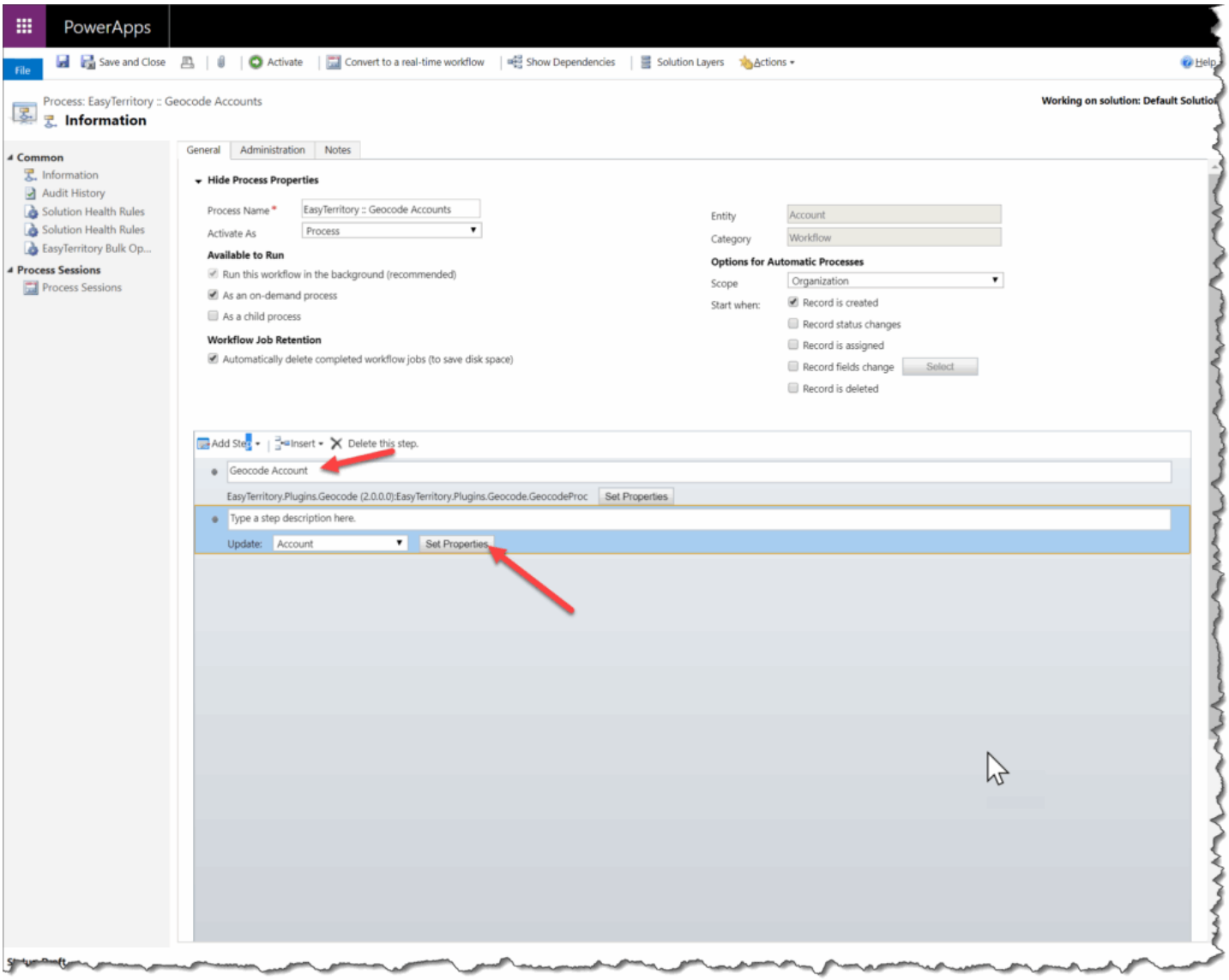
Use either the **Location Lookup plugin** or the **Postal Code Lookup plugin** instead.

Step 4. Create an Update Record Step

Use the **Form Assistant** to access values returned from the Geocode step.

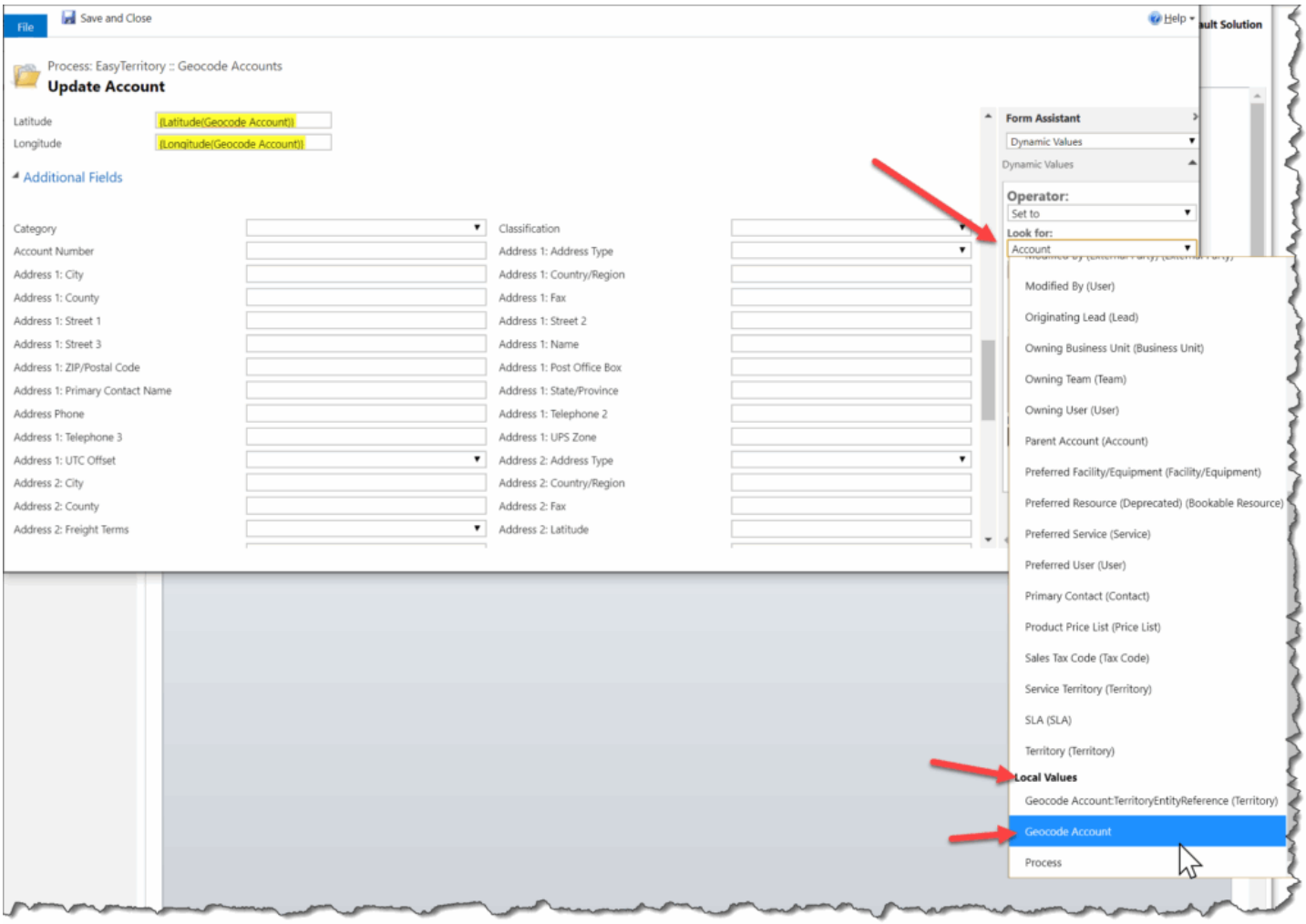
Add an **Update Record** step after the Geocode step.

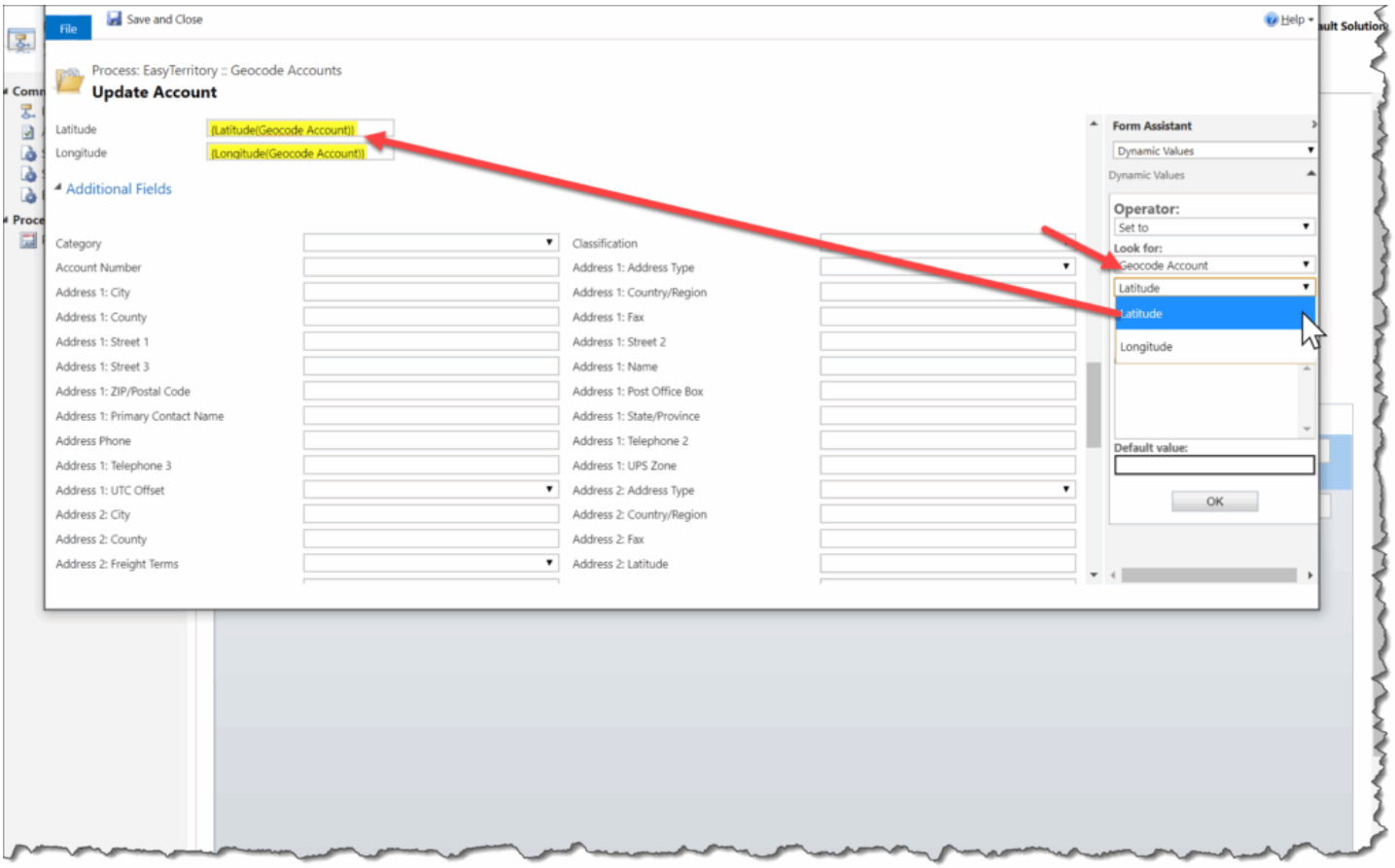
Note the name of the previous step (for example, *Geocode Account*).



Step 5. Set Latitude and Longitude Fields

Configure the latitude and longitude fields based on their data type:


File
Save and Close
Help
Process: EasyTerritory :: Geocode Accounts
Update Account
Latitude
{Latitude(Geocode Account)}
Longitude
{Longitude(Geocode Account)}
Additional Fields
Category
Account Number
Address 1: City
Address 1: County
Address 1: Street 1
Address 1: Street 3
Address 1: ZIP/Postal Code
Address 1: Primary Contact Name
Address Phone
Address 1: Telephone 3
Address 1: UTC Offset
Address 2: City
Address 2: County
Address 2: Freight Terms
Classification
Address 1: Address Type
Address 1: Country/Region
Address 1: Fax
Address 1: Street 2
Address 1: Name
Address 1: Post Office Box
Address 1: State/Province
Address 1: Telephone 2
Address 1: UPS Zone
Address 2: Address Type
Address 2: Country/Region
Address 2: Fax
Address 2: Latitude
Form Assistant
Dynamic Values
Dynamic Values
Operator:
Set to
Look for:
Account
Modified By (User)
Originating Lead (Lead)
Owning Business Unit (Business Unit)
Owning Team (Team)
Owning User (User)
Parent Account (Account)
Preferred Facility/Equipment (Facility/Equipment)
Preferred Resource (Deprecated) (Bookable Resource)
Preferred Service (Service)
Preferred User (User)
Primary Contact (Contact)
Product Price List (Price List)
Sales Tax Code (Tax Code)
Service Territory (Territory)
SLA (SLA)
Territory (Territory)
Local Values
Geocode Account:TerritoryEntityReference (Territory)
Geocode Account
Process



Latitude & Longitude

Use these outputs when the target fields are of type **Floating Point** or **Decimal Number**.

LatString & LongString

Use these outputs when the target fields are of type **Single Line of Text**

Additional Returned Fields

The Geocoding plugin also returns additional values that can be stored on the record.

Quality

Indicates the accuracy of the geocode result.

This should be stored in a **Single Line of Text** field.

Returned values:

- **Bing Maps:** High, Medium, Low
- **EasyTerritory service:** Best, Good, Fair, Poor

Mapping behavior:

- Bing **High** → Best or Good
- Bing **Medium** → Fair
- Bing **Low** → Poor

Match Fields

The following fields return standardized (cleaned) address components and should be stored as **Single Line of Text** fields:

- Match Address
- Match City
- Match County
- Match State
- Match Country
- Match Full Address
- Match Postal Code (Zip 5 and Zip +4)
- Match Zip 5 (Zip 5 only)
- Match Zip 4 (Zip +4 only)

Geocoding Existing Records

After activating your geocoding process, you'll need a way to geocode all existing records.

- **Small datasets:**
  Use **Advanced Find** and run the workflow **on demand**.
- **Large datasets (thousands of records):**
  Use the **EasyTerritory Bulk Operation Utility**.

Mapping Geocoded Records

Once your data has been geocoded, you can create an **Advanced Find** view and map the records using EasyTerritory.

Follow the standard steps to build your Advanced Find view and display the results on the map.

Note

The Geocoding Workflow Plugin is intended for **server-side, automated geocoding** triggered by record creation or address changes. For interactive or map-based geocoding scenarios, use EasyTerritory project-based tools instead.

Quality: How accurate the geocode is. This should be a ‘Single Line of Text’ field. The Bing Geocoding service returns the following values: High, Medium and Low. The EZT service returns Best, Good, Fair, and Poor. Bing “High” confidence values map to “Best” or “Good” based on secondary information, “Medium” maps to “Fair”, and “Low” to “Poor”.

After your data is geocoded, create an ‘Advanced Find’ to map records.

- Follow these steps to build your ‘Advanced Find’ view.