Pulling and Pushing Territory Designer Projects

MCP Server · https://www.easyterritory.com/documentation/ezt-mcp/designer-pull-push/

EZT MCP and Territory Designer work as a roundtrip. Your agent can pull an existing Designer project into an EZT MCP session, work on it, and push the result back to Designer, where planners review and approve it. That connection now lives inside the MCP Server, so you no longer hand-manage access to Designer or keep a token anywhere your agent can read it.

How the roundtrip works

1. **Pull.** Your agent brings a Designer project into EZT MCP. Its territories, point layers, colors, and routes come with it.
2. **Work.** EZT MCP is built on the same tools as Territory Designer, so everything it does works on the pulled project: rebalance territories, grow a new franchise territory next to existing ones, check contractor coverage, or schedule visits.
3. **Push.** Your agent sends the result back to the same project, or creates a new one, so planners can review it in Designer.

Connect your Designer account once

Ask your agent to set up the Designer connection. It hands you a link: open it in your browser, paste your Designer agent token on the page, and submit. The token is stored encrypted on the server and used for every pull and push after that. You never share it in chat, and you never keep a copy anywhere your agent can read it.

Two messages sound alike but mean different things. If your agent says Designer is not linked, you simply have not connected the account yet: ask it to set up the connection and use the link it hands you. If it says Designer linking is not configured, that is a setting on our server rather than anything you did, so email support and we will finish it on our side.

The token comes from Designer itself. A Designer administrator creates one on your user record, under Admin, then Users. Creating a new token revokes the previous one, so only create one when you mean to replace the old.

You need a Territory Designer site and your Designer sign-in. Beyond that, your agent gets the technical details it needs from the MCP server, so all you have to tell it is which project to use and what you want done.

Create or update a Designer project

Ask your agent to save the current work to Designer and it asks you for a project name first, then creates a new project with that name. Ask it to update an existing project instead, and it changes that project in place.

- **Create** adds a new project to Designer under the name you give it.
- **Update** adds new territories and changes existing ones in that project. Anything not in the push stays where it is, and any markup your planners have locked in Designer is skipped.
- The one part you cannot undo: if you push a point layer that already exists in that project, its rows are replaced. Accounts you removed from the session disappear from that layer in Designer.

An update cannot be undone, so check what is about to change and confirm before you run one. If you are not sure, create a new project instead and compare the two in Designer.

See which Designer projects you can reach

Ask your agent which Designer projects are available. It lists the projects your Designer user can see, by name. You can search the list, filter it by tag, or ask for only the projects you created yourself.

Pull a Designer project back

To work on an existing Designer project, ask your agent to pull it. The project comes into your session as a territory solution, and your agent can keep working on it with every territory tool. A pull brings in point layers of up to 200,000 points.

Hand-drawn shapes and radius buffers come in as area layers, measured by which points fall inside them. You can ask your agent to leave those polygons out if you only want the ZIP or county territories.

What to ask your agent

- "Connect my Designer account."
- "Pull my Q4 Alignment project from Designer and rebalance it after adding 200 accounts."
- "Pull the Southeast franchise project and grow a new territory around this address to about 100,000 households, without overlapping the existing ones."
- "Check HVAC coverage using the contractor layer in this project, with a 45-minute limit."
- "Which Designer projects can you see? Just the ones I created."
- "Push the result back to the same project" or "Save it as a new Designer project called Q4 Draft."

What comes across

- Territories built in Designer, with their ZIP or county assignments
- Uploaded point layers with all their columns
- Colors, classifications, and Designer point symbols (they match 1:1 when you push back)
- Routes

Catalog reference layers stay in Designer.

Things to know

- Pushing back adds and updates; it never deletes a territory, a layer, or a route. The exception is a point layer you push that already exists: its rows are replaced.
- A push carries up to 1,000 territories and 100,000 points, and a pull brings in point layers of up to 200,000 points. Very large projects can hit those limits.
- An update cannot be undone, so confirm a push before your agent runs one.
- Colors travel with the project. Recolor in EZT MCP before pushing, because recoloring in Designer is reset on the next agent update.

- New projects created from EZT MCP are private by default.

If you cannot use the built-in connection

The older manual path still works: export the territory solution from your session and post it to Designer yourself. It takes more steps and you keep track of the file and the project on your side, so treat it as the fallback and use the built-in connection when you can.

Data handling

A pulled project becomes EZT MCP working data. Like all working data, it is deleted automatically about 1 hour after last use. If you come back later, pull again so you work from the current Designer version. Designer stays the system of record, and EZT MCP never changes it unless your agent pushes.

Next steps

- Service Network Coverage
- Tools Reference
- Connecting Your AI Agent