Frequently Asked Questions

MCP Server · https://www.easyterritory.com/documentation/ezt-mcp/frequently-asked-questions/

New to MCP Server? Here are answers to the most common questions about AI-powered territory planning through Model Context Protocol.

What is an MCP server for territory planning?

The Model Context Protocol (MCP) is an open standard that lets AI agents connect to external tools and data. MCP Server exposes 58 territory planning tools — building, balancing, routing, scheduling, analysis — to any MCP-compatible AI agent like Claude Desktop or Grok Bot. Instead of clicking through a UI, you describe what you want in natural conversation and the agent executes it through the MCP Server.

Which AI agents work with EasyTerritory MCP?

Any compatible host works, including Claude Desktop, Claude Cowork, Grok Bot, and Cursor. Hosts that can set a header use an API key. Hosts that only support OAuth sign in at the server and paste the same key once on the consent page. See Connecting Your AI Agent and Connecting an OAuth-Only Agent.

See the Connecting Your AI Agent guide for step-by-step setup instructions.

Is my data stored by the MCP server?

Only briefly, and MCP Server is never your system of record. Account data you send is held in short-lived working storage for the requested operation and your live map session, and it expires about an hour after you last use it and is then deleted. Save your work any time with `export_geojson`. Usage, audit, and operational logs record metadata such as which tool ran, when, and whether it succeeded, not your account rows, and are kept for 1 year. Subscriber data is destroyed within 14 business days after a subscription ends. We don't use your data to train AI models, and the service is hosted on Microsoft Azure in the US. You and your organization own your data end to end. See our Privacy Policy

for details.

Do I need to install or self-host anything?

No. EasyTerritory hosts the MCP Server — you connect your AI agent to the endpoint and go. There is no infrastructure to deploy, no dependencies to install, and no server to maintain. If you prefer hands-on refinement, export the Territory Solution and open it in Territory Designer.

Can I use my existing territory files?

Yes. Account lists come in as CSV or Excel; your agent stages the file through an upload link, then loads it. The durable Territory Solution is a standard GeoJSON FeatureCollection — save with `export_geojson`, reopen with `import_geojson`. There is no compact or proprietary project format. If you have an existing alignment in a spreadsheet (Postal Code + Territory columns), the `direct_build` tool maps it automatically.

How does AI territory balancing work?

You define the goals — territory count, target workload hours, or balance metrics — and the agent uses spatial optimization to partition accounts into balanced territories. The server considers drive time, account density, and workload distribution. After building, you can analyze equity across territories, then split, merge, or realign individual regions through conversation or visual map selection.

See Territory Building with AI for detailed examples.

What is the difference between Territory Designer and the MCP Server?

Territory Designer is a browser-based visual application for building and managing territories with a point-and-click interface. The MCP Server exposes the same territory planning capabilities through the Model Context Protocol, letting AI agents do the work through natural conversation. EZT MCP is built on the same tools as Territory Designer. Save the Territory Solution as GeoJSON and open it in Territory Designer for hands-on refinement. You can also pull a Designer project straight into a session and push results back; see Pulling and Pushing Territory Designer Projects.

How do I push a territory plan to Territory Designer?

Ask your agent to save the work to Designer. It asks for a project name and creates a new Designer project, or updates an existing project you name. Connecting your Designer account is handled inside the MCP Server: your agent hands you a link, and you paste your Designer agent token on that page once. An update adds and changes territories only, and markup locked in Designer is skipped; a point layer you push that already exists in the project has its rows replaced, and that part cannot be undone, so confirm before running one. See Pulling and Pushing Territory Designer Projects.

What data formats does the MCP Server accept?

CSV for account ingest. GeoJSON FeatureCollection for the Territory Solution (the only project file). Gzip is compression, not a second format. Account data can include any columns (revenue, units, rep name, etc.) — these become point properties available for balancing, classification, and analysis. The server geocodes addresses inline during ingest if coordinates are missing.

How many tools does the MCP Server expose?

58 tools, organized into two tiers. **Tier 1 goal tools** (prefer these) handle complete workflows in one call: build, ingest, realign, analyze, route. **Tier 2 primitives** compose for edge cases: part selection, map configuration, GeoJSON import/export, delegation. See the full Tools Reference for the complete list.

Can I build territories for a specific state or region only?

Yes. When building, set `part_scope` to `"explicit"` and provide a `part_filter` (e.g. `{"state_abbr": "TX"}`). This ensures the build only uses parts within the specified state, rather than inferring scope from the bounding box of your account data.

Which boundary layers can I build territories from?

ZIP codes, counties, Canadian FSAs, and postal areas in a range of other countries, including the UK, Germany, France, and Italy. See the full list of supported countries, or ask the agent to list the available layers.

What if my agent only supports OAuth?

Add `https://mcp.easyterritory.ai` as a custom connector and sign in. On the consent page, paste the API key EasyTerritory issued. You enter it once. Leave any OAuth client ID and secret blank. The walkthrough is Connecting an OAuth-Only Agent. No key yet? Request a free trial.

Can I grow one territory around a single location?

Yes. `seed_build` grows one territory outward from an address or coordinate until a location count or a metric total is as close as possible. It does not divide every account into balanced territories, and it does not draw a drive-time ring. Ask for one territory per location.

What is the ExpertPack knowledge layer?

The ExpertPack is a structured knowledge layer that encodes a decade of EasyTerritory's territory design expertise — workflows, tool selection rules, common mistakes, and design decisions. It is not found in foundation AI models. The MCP Server uses it to guide agents toward correct workflows, reducing wrong-tool and wrong-order failures.

How does Service Network Coverage define “covered”?

You choose: a drive-time limit (for example, 45 minutes) or each contractor's declared service ZIPs. You analyze one trade per run, optionally filtered by tier. See Service Network Coverage.

Can schedules follow real calendars?

Yes. Give a start date, then add blackout dates or ranges (including yearly repeats and weekly rules), fixed appointments, due dates, and allowed weekdays. If the calendar can't be satisfied, the run stops with a date-conflict error instead of quietly dropping a rule, and any due date the plan misses is listed by account. See Scheduling with Dates, Blackouts and Depots.

Does it write to my CRM or Dynamics 365?

Only in Microsoft Copilot, and only when you confirm. There it can read your Dynamics 365 account views, as you, to load accounts without an export, and write results such as territory, route, or visit schedule back to those account records. It shows a preview first and writes nothing until you confirm. Other clients don't write to a CRM: publish results through Territory Designer, or have your agent or

automation write them where you need them.

Can I use it with regulated data, such as health records?

Talk to us before sending regulated or sensitive personal data, so your security team can review how it would be handled. Many teams send only coordinates or ZIP-level points, not names.

How accurate is “drive time”?

It depends on the tool. Coverage checks default to a fast straight-line travel estimate and can switch to real drive-time areas around up to 25 contractors per call. Addresses are geocoded with TomTom and Azure Maps. Drive-time areas come from the Azure Maps road network, and routes report road distance and drive time from Azure Maps. Territory workload uses the travel estimate plus your onsite time.

How big can I go?

Drive-time areas: 25 origins and 5 bands per call. Points in a territory: up to 10,000 listed per territory, with counts and totals always covering every point. Account uploads: up to 100,000 rows per upload, from a CSV or Excel file of up to 25 MB through the browser upload link (valid for 60 minutes), or up to 25 MB of CSV text per call. Address geocoding on its own takes a staged file and is capped at 10,000 rows per call. Designer projects: up to 250,000 features when you pull one into a session. Ask us about national-scale projects.

What does it cost?

One EZT MCP seat is included with EasyTerritory Enterprise, and EZT MCP is available with Standard during Early Access. Trials last 14 days. See Pricing.

Still have questions? Start a free trial or contact us — we are happy to help you get started.