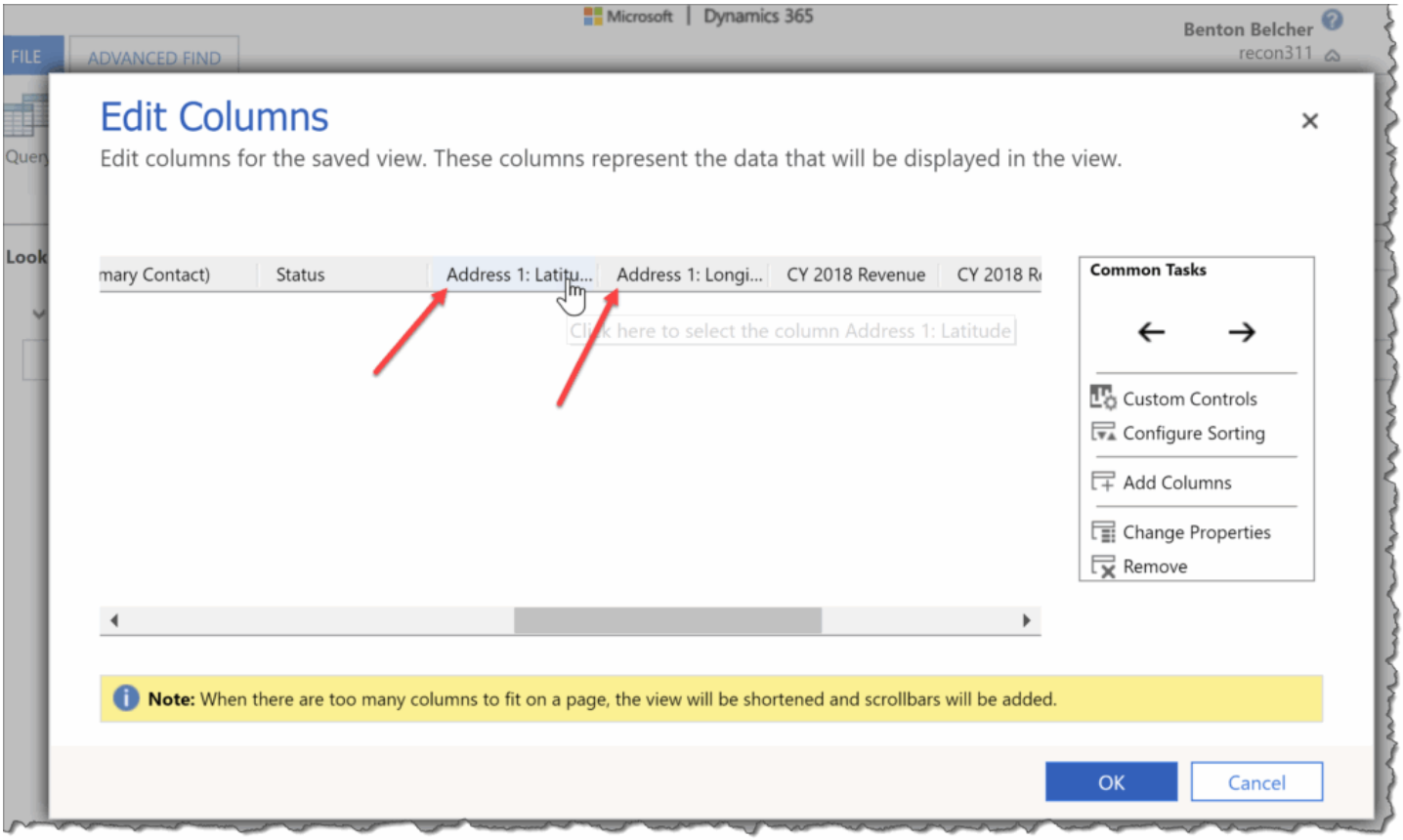
Configure Advanced Find Map

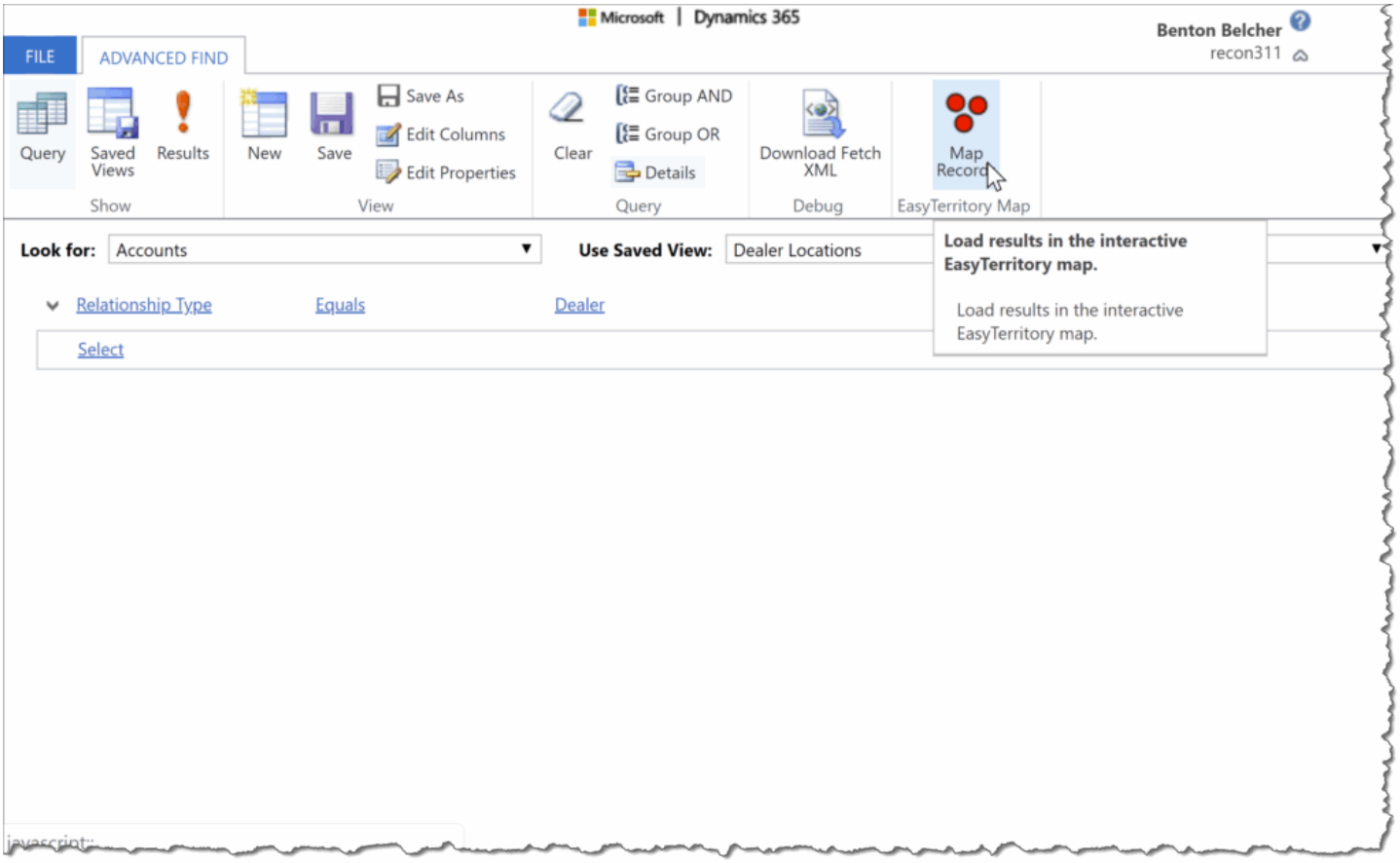
Internal Help Docs · https://www.easyterritory.com/documentation/on-premises-setup-internal-docs/configure-advanced-find-map/

The Advanced Find Map is a great way to map data in the EasyTerritory application. With the Advanced Find Map enabled any user can do an advanced find and then map the results. Basic users will only be able to see records they own and administrative users can see all records. The Advanced Find Map functionality is meant to be used for business intelligence and spatial analysis on the data.

To set up the Advanced Find map functionality, follow these steps.

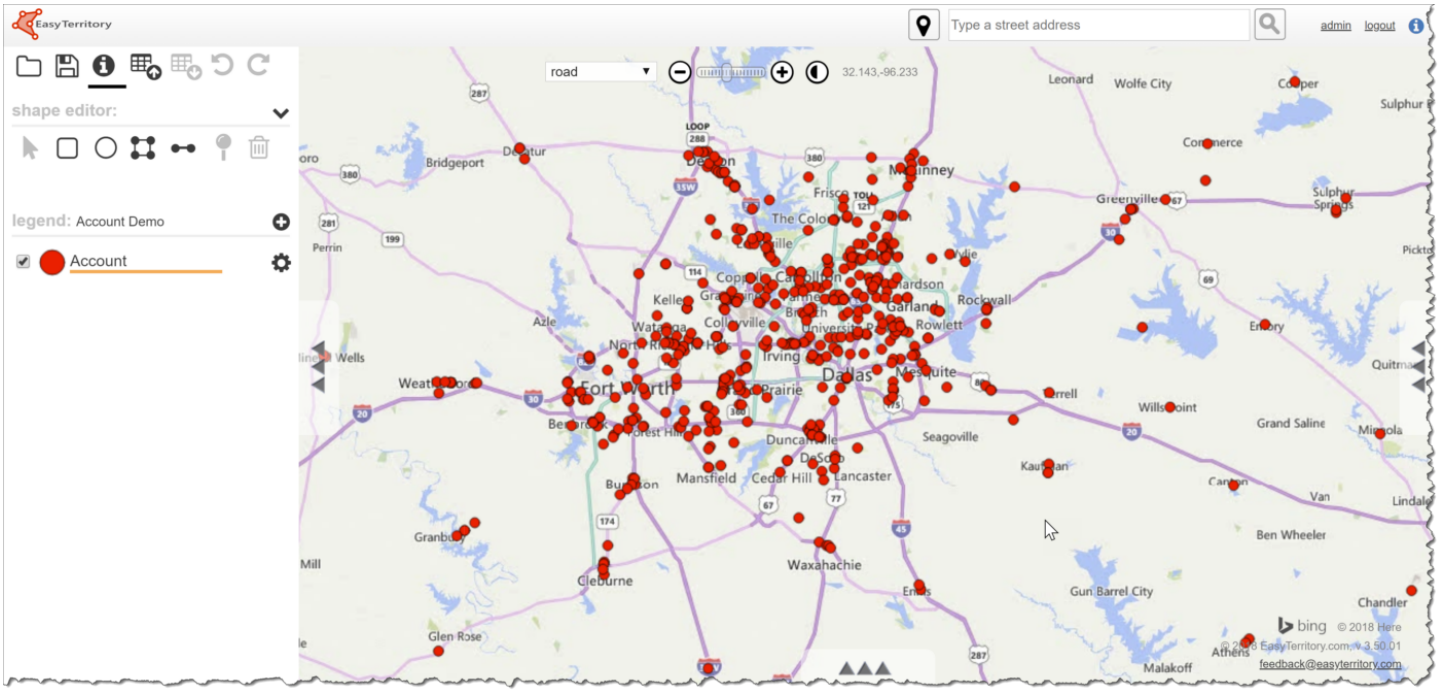
- Make sure your data is geocoded. Follow these steps to geocode your data if needed.
- Build an Advanced Find view that contains the Latitude and Longitude columns. Example: address1_latitude and address1_longitude.





- When the EasyTerritory application loads for the first time, you'll be prompted for your CRM login credentials. The credentials are stored as a cookie in your browser so that you don't have to enter them in every time you load a map. NOTE: If you have Azure AD enabled, you will not be prompted for credentials.

1.



Once the data loads, you can classify, filter, search and query the data.