What’s New? (Release Notes)

Release Notes · https://www.easyterritory.com/documentation/territory-designer/whats-new-release-notes/what-new-release-notes-easyterritory/

Version 3.206.0 — October, 2026

This covers everything released since 3.198.2, summarized. The headline items:

- The AI help panel has a larger message box that grows as you type: Enter sends, Shift+Enter starts a new line.
- Territories exchanged with your AI agent use standard part-layer identifiers, so a build on French postal codes or UK districts lines up with the layer the MCP Server knows.
- An agent save can finish like a Designer save, running the project’s post-save plugin and rebuilding its Power BI assets.
- Building from a spreadsheet writes a **Notes** column into territory notes, and a rebuild updates a note without redrawing an unchanged shape.
- Auto-build can start from technician homes, depots, or any point layer rather than only from the work itself.
- Markup Workflows can contour every visible partition in one undoable step, and ctrl-click copies values between matching columns in the data grid.
- Routes pushed to a CRM work queue carry each stop’s service duration.
- Microsoft sign-in runs on Microsoft’s current browser library, administrators can pin the Entra redirect address, and multi-ring territories count points in every ring.

These releases also complete a round of routine security work on sign-in and project permissions. Day-to-day use is unchanged, with one exception: a CRM lookup pointing at a project marked *private* now requires the calling account to be the project’s creator, an administrator, or in a group that contains the project. Otherwise it returns 403. Unmark the project or add the account to a group to restore it.

Version 3.198.2 — September, 2026

This release adds application styles, expands routing, and corrects the Azure Maps key check, Microsoft sign-in, and several map and layout issues.

Light and Dark styles

A Style menu in the header switches Territory Designer between Light and Dark. Your choice is remembered the next time you open Designer. The sign-in page stays in the Light style. Sites that still need the previous look can have it turned back on by an administrator.

EasyTerritory MCP Integration

Enterprise customers can now take advantage of the new EasyTerritory MCP integration with Designer. MCP Server can create your territory alignments, schedules, and bulk routing projects in the background using your corporate AI agent. Open Designer in the morning to see the projects your agent proposed from last night’s run. Contact your EasyTerritory account manager to get set up today.

Rolodex and settings appearance

Project cards in the Rolodex stay inside the paged panel, and the page controls remain visible. In Dark style, the Admin Settings JSON editor follows the rest of the application, including its fields, tables, and buttons.

Routing

Routing can use a selected travel mode, including truck routing through Azure Maps. Truck routes can include vehicle metrics so restrictions are applied to the vehicle you specify.

Start locations added from another layer, such as technician locations, stay the first stop on a route even when route priorities are in use. A priority depot no longer jumps ahead of that start stop.

Territory statistics

Range classifications now match the counts shown on the map. Numeric values that arrived as text were previously counted as zero in the per-class breakdown.

Safer message and Help text

Message dialogs show message text as plain text. Links in Help responses are limited to ordinary web, mail, and in-app addresses.

Azure Maps key check

When the map opens, Designer checks that the Azure Maps key is valid. That check was still calling an Azure Maps v1 service, which no longer accepts the call. A valid key was reported as invalid, and Designer displayed a false alert. The check now uses a current Azure Maps service, so a valid key is accepted and that alert is no longer shown.

Microsoft sign-in

Signing in with Microsoft no longer stops on a blank page when a previous sign-in was interrupted. Refreshing, using Back, or opening Designer again during sign-in could leave that attempt unfinished and block the next one. Designer now clears that interrupted attempt and continues to the Microsoft sign-in page.

Version 3.191.1 — July, 2026

This release introduces the AI Help Assistant, routing and scheduling improvements, stronger authentication reliability, and several usability enhancements.

New AI Help Bot

EasyTerritory now includes an AI-powered Help Bot for in-app guidance. Ask your EasyTerritory administrator to enable it.

- Responses stream in real time.
- Conversations remain available when the panel is closed and reopened.

- Conversations can be cleared when no longer needed.
- Bot responses can be copied to the clipboard.
- Basic in-app automation enables the bot to help users complete supported actions.
- Updated styling improves readability and usability.

Routing & Scheduling Improvements

Existing routes can now be rerouted without creating a separate route, making it easier to adjust routing options while preserving the original route identity.

Scheduling logic has also been improved to prioritize complete visit schedules before optimizing travel cost.

Markup ID Visibility

Non-administrator users can now view markup IDs while editing remains restricted to administrators. This makes IDs available for troubleshooting and integration workflows without expanding edit permissions.

Dynamics 365 Large-View Fix

Dynamics 365 views containing more than 5,000 records now handle paging cookies correctly, preventing paging failures caused by double encoding.

Link & Copy Feedback Improvements

Project-saved dialogs now provide clearer visual feedback when links are copied. Links displayed in message dialogs also behave consistently with links in the project-saved dialog.

Version 3.186.8 — December 2025

These releases focus on performance improvements, data handling fixes, and workflow reliability. Together, they improve scheduling responsiveness, reporting accuracy, and overall system stability.

Scheduling Performance & Reporting Improvements

Scheduling operations have been optimized to improve responsiveness, especially in larger datasets. Reporting related to scheduling has also been enhanced to ensure more accurate and reliable outputs, reducing delays and improving confidence in scheduled results.

CSV Metadata Handling Fix

CSV imports have been corrected so metadata no longer incorrectly assigns the *county* role. This prevents unintended field mappings and ensures cleaner, more predictable data ingestion.

User Tracking & Platform Updates

An issue affecting maximum user tracking has been resolved, improving accuracy in user-related metrics and limits. Updates to the latest development tools and platform standards.

Data Grid Realign Behavior Fix

A workflow issue where the data grid would clear instead of closing after a realign action has been fixed. The grid now behaves as expected, preserving user context and preventing accidental data loss.

Version 3.186.4 — October 30, 2025

This release focuses on streamlining territory design, markup editing, and Power BI integration. It introduces new visualization tools, better link handling, and expanded options for territory management.

Power BI Toolbar Enhancements

You can now launch key territory and markup tools directly from the Power BI toolbar.

- **Create a Layer from Visible Polygons** – Instantly convert visible map polygons into a new data layer.
- **Build New Markup by Joining Territories in Each Group** – Quickly merge grouped territories and generate new markup without leaving the toolbar interface.

These enhancements make map editing in Power BI more fluid and reduce the need for context switching between menus.

New Post-Save Project Dialog

After saving a project, users will now see a redesigned post-save dialog. It features **improved copy and paste support**, allowing you to quickly grab and share project links for collaboration or Power BI setup purposes.

Markup Workflow Enhancements

The “Rebuild All Territories” option in markup workflows now includes new cleanup capabilities:

- **Remove Holes** – Automatically fills small gaps or empty spaces inside polygons.
- **Remove Rings** – Removes unnecessary inner rings to simplify complex territory shapes.

Rolodex Styling Improvements

The in-app Rolodex interface has been restyled for better readability, improved spacing, and a more consistent look across devices and browsers.

Improved Auto-Naming for Projects

Project creation now benefits from smarter automatic naming logic. EasyTerritory intelligently generates meaningful project names based on context, reducing manual setup and ensuring a cleaner project list.

Split Territories from the Stats Dialog

A new feature allows users to **split a territory** directly from the statistics dialog. This provides faster adjustments during analysis and eliminates the need to return to the map editing view for simple divisions.

Routing Engine Enhancements

The routing engine now includes improved **route-stop-priority** handling.
This ensures that stops with higher importance or specific sequencing rules are factored more

accurately into optimized routes.

New “Visualizations” System

A major new capability in this release introduces **Visualizations**—saved configurations of map styles, filters, and classifications that can be swapped within a single project.

This allows users to create multiple visual perspectives of the same dataset:

- Save different thematic or analytical views (e.g., sales density, service zones, coverage balance).
- Instantly toggle between map styles and classifications without duplicating projects.

Previously, users had to create multiple projects to achieve similar results. The new system greatly simplifies analysis and presentation.

General UI & Performance Improvements

- General cosmetic and styling refinements throughout the platform.
- Minor performance improvements in territory editing and data rendering.