



DYNAMICS 365

FINANCE AND OPERATIONS

DEFAULT SERVICES

LogTrade

2018-12-07



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1 GENERAL

This document describes the possibilities to add services to shipments by default. These default services can be defined at a company-wide level, for a specific customer, or for a specific order.

Under LogTrade Connect->Setup->Default services you can administrate the default services but you can also find the page from the customer page and also the sales order page.

You can also define default values for a service using the same routine. It means that the service is not automatically added to the shipment, but if you add the service, default property values will be applied.

When working with default services, you will always work with service groups, and not carrier specific services.

The screenshot shows the Dynamics 365 interface for 'Service groups'. The breadcrumb navigation is 'LogTrade Connect > Setup > Service groups'. The page title is 'Service groups'. Below the title, there are two tables. The first table lists service groups, and the second table shows the details for the selected 'LogTrade Delivery Advice' group, including a table of modes of delivery and service codes.

Service group	Description
Heat	Heat
LogtradeDeliveryAdvi	LogTrade Delivery Advice
LogtradeDocumentAdvi	Logtrade transport document li...
LogtradeEmailAdviceS	LogTrade email advice
LogtradeLoginAdviceS	Logtrade login link advice
LogtradeSmsAdviceSer	LogTrade SMS advice
Miljöfrakt	Miljöfrakt
Tjänstegrupp 1	grupp 1

Mode of delivery	Service code
10	SchenkerSwedenLogtradeDeliv...
AGENT	PostNordSwedenLogtradeDeliv...
EXPRESS	UpsGlobalLogtradeDeliveryAdvi...
FULLLOAD	DhlSwedenLogtradeDeliveryAd...
HOME	PostNordSwedenLogtradeDeliv...
PARCEL	DhlSwedenLogtradeDeliveryAd...
PARTLOAD	SchenkerSwedenLogtradeDeliv...





To define a default service, click the *New* button.

A small dialog appears, where you can define criteria for when adding the service. For example, you can define that the service should only be applied on return orders.

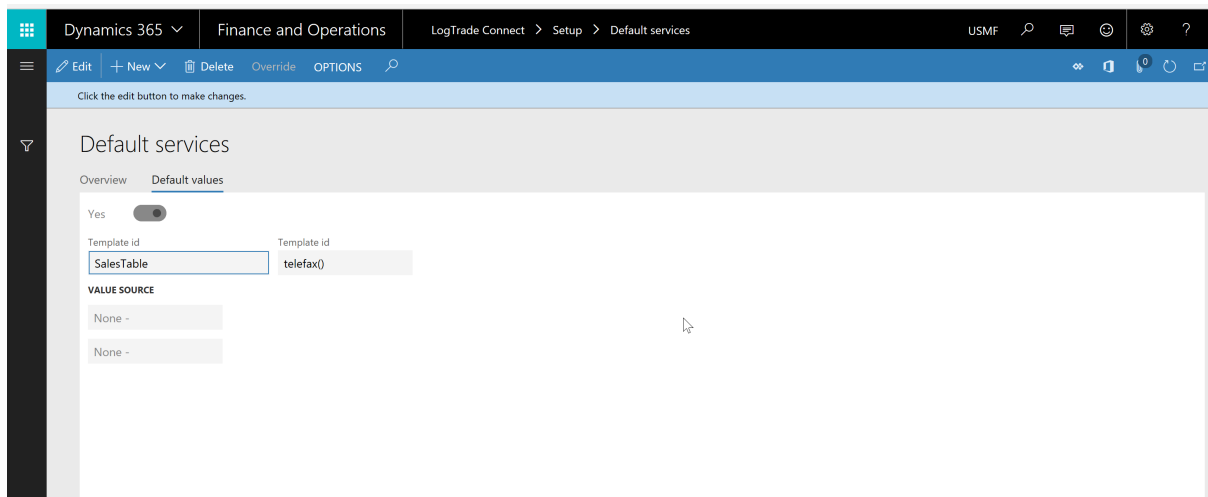
By marking the *Default* flipswitch (Add) the service will be automatically applied to a new shipment. If the switch isn't turned on, the values you define will work as default property values only.

Source type	Source document type
None	None
Customer	None

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Once the line is created, you can go to the *Default values* tab and enter the property values that goes with the service.

If you do add a default service (The Default switch is on) you can chose not to define property values, and if there are defined property values on another level they will be used when the service is applied to the shipment.



If you define a default service on a specific level (for exampel on a customer), and then opens the *Default services* dialog from a sales order (belong to the customer), you will see the defined service on the sales order, with a checkmark in *inherited*. The line is readonly, to inform you that this service will be applied as well. If you need to change it (for this order, or for a specific customer if inherited from global level) you can use the button *Override*. This only works with Default added services, not default property values.