

DYNAMICS 365
FINANCE AND OPERATIONS

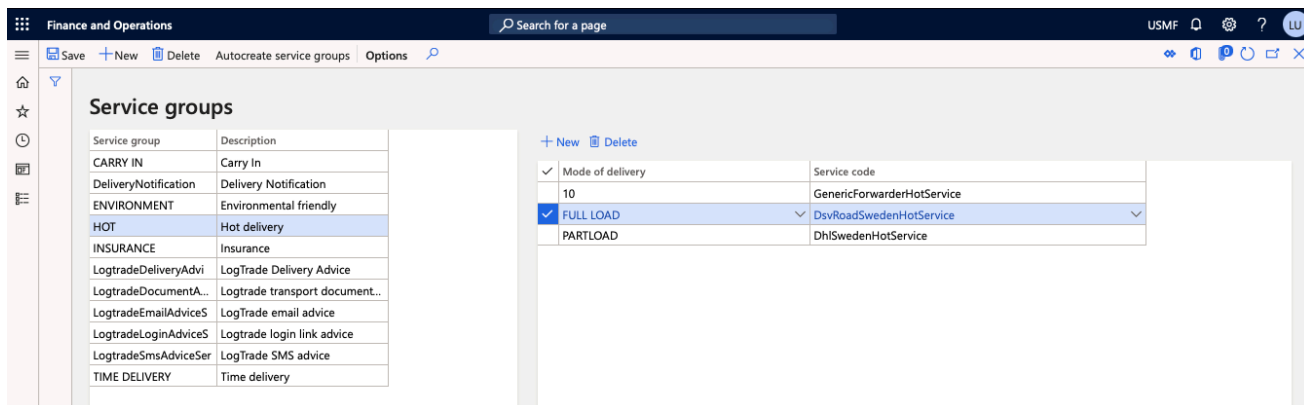
**SERVICE GROUPS
AND
DEFAULT SERVICES**

LogTrade
2021-01-29

1. General

This document describes the possibilities to create service groups that can be used on consignments, manually or by default. The default services can be defined at a company-wide level, for a specific customer, or for a specific order.

You create *Service Groups* in the page named *Service Groups* and here you also map them to each *Mode of Delivery*.

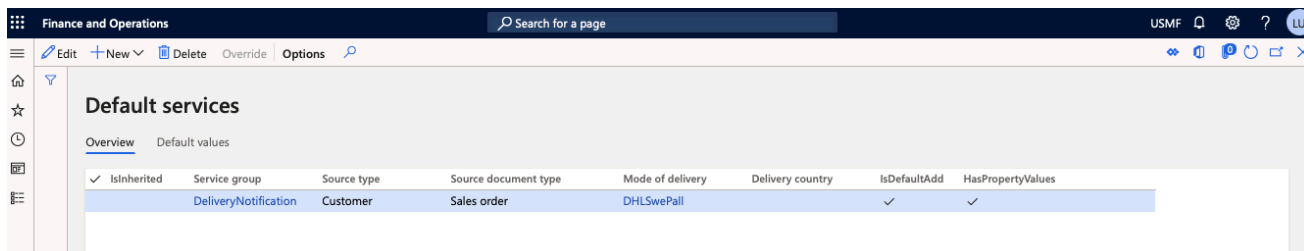


1.1. Default services

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 consignment, but if you add the service, default property values will be applied.

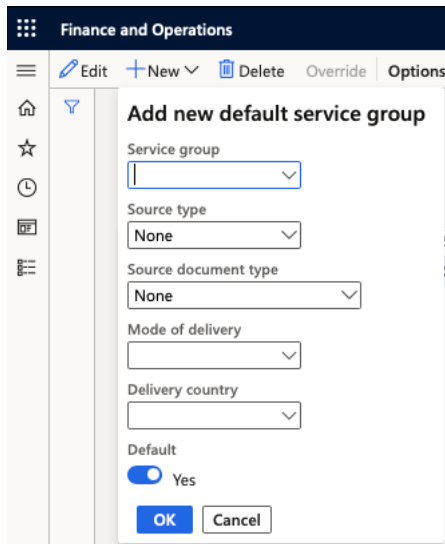
When working with default services, you will always work with service groups, and not carrier specific services.



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

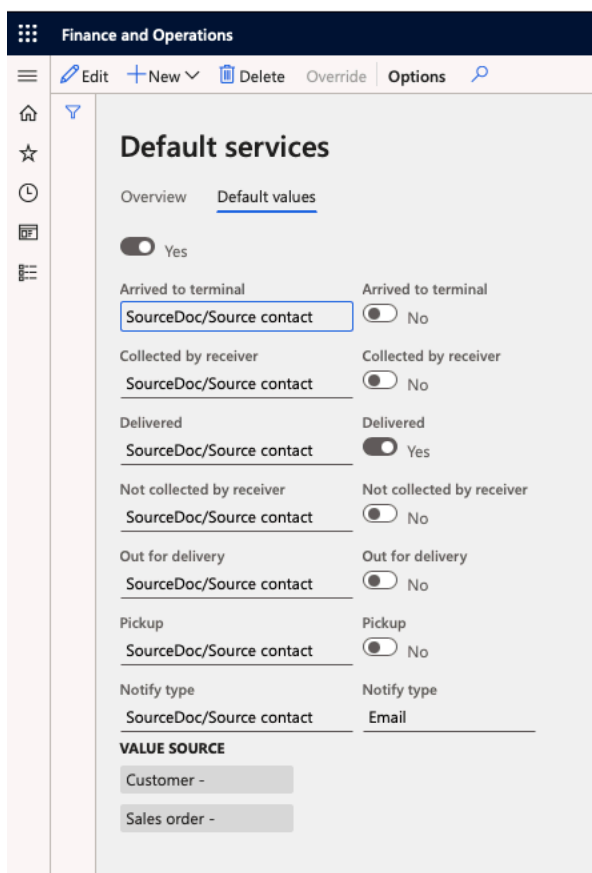
A small dialog appears, where you can define criteria for when adding the service. For example, you can define that the service should only be applied on return orders.

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



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 consignment.



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.