

Microsoft Certified: Dynamics 365 Supply Chain Management Functional Consultant Associate – Skills Measured

NOTE: The bullets that appear below each of the skills measured are intended to illustrate how we are assessing that skill. This list is not definitive or exhaustive.

NOTE: In most cases, exams do NOT cover preview features, and some features will only be added to an exam when they are GA (General Availability).

Use common functionality and implementation tools

Identify common Microsoft Dynamics 365 Finance features and functionality

- determine when to use workspaces
- identify use cases for Power Platform apps including Power Apps, Power BI and Microsoft Flow
- identify and differentiate between the global address book and other address books
- demonstrate Work Items functionality
- demonstrate Microsoft Dynamics 365 Finance navigation techniques
- identify Inquiry and Report types available in a default installation

Implement Lifecycle Services (LCS) tools

- identify opportunities to re-use existing assets
- analyze Business Process Modeler results and identify gaps in functionality
- including creating an Acceptance Testing BPM library and analyzing the results
- use the LCS tools including Issue Search and analyze results

Configure security, processes, and options

Implement security

- identify and distinguish between the various standard security roles in Finance and Operations
- distinguish between duties, privileges, and permissions
- assign users to security roles based on given scenarios

Design and create workflows

- identify opportunities for automation and controls based on customer workflows
- configure workflow properties and elements
- troubleshoot workflows

Configure options

- set up and configure legal entities
- configure base number sequences
- import or create all necessary startup data including Zip/Postal Code data, customers, vendors, and products
- configure the calendars and date intervals
- configure units of measure and conversions
- configure posting profiles and definitions
- create organization hierarchies
- apply purposes and policies
- describe and apply user options

Implement Microsoft Dynamics 365 Finance common features

- configure Microsoft Office integration with Microsoft Dynamics 365 Finance
- configure email (SMTP/Exchange)
- create and maintain email and record templates
- integrate Power BI with Entity store
- create, export, and import personalizations
- set up network printing

Implement business processes for the solution

- define use case scenarios
- participate in phase-based planning processes and the solution design
- design and create workflows
- set up batch Jobs and alerts
- use business process workspaces

Perform data migration

Plan a migration strategy

- identify common migration scenarios and tools in Microsoft Dynamics 365 Finance
- determine migration scope
- identify relevant data entities and elements based on given scenarios
- establish migration strategy processes including migration scope

Prepare data for migration and migrate data

- identify and extract source data
- generate field mapping between source and target data structures
- support the transition between the existing and migrated systems
- perform a test migration and validate output from the process

Validate and support the solution

Implement and validate the solution within Microsoft Dynamics 365 Finance

- perform user acceptance testing (UAT)
- prepare and validate to Go live
- build test scripts to test business functionality
- automate test case automation by using the Regression Suite Automation Tool (RSAT)
- demonstrate the correlation between test scripts and business requirements
- monitor validation test progress and make ad hoc changes during validation testing to correct identified issues

Support Application Lifecycle Management (ALM) by using LCS

- perform a solution gap analysis
- use LCS tools to identify, report, and resolve issues
- manage Microsoft Dynamics 365 One Version

Implement product information management

Create and manage products

- create a product and product variants
- create Bill of materials (BOMs)
- identify the purpose and capabilities of the Product Configuration models
- create and configure category hierarchies
- create product attributes

Configure products for supply chain management

- create and manage inventory dimensions
- create Item groups and Item model groups
- create and print product labels
- create and assign bar codes
- configure Item coverage
- configure product compliance processes

Manage inventory pricing and costing

- configure inventory costing
- configure costing versions
- configure and manage commodity pricing
- create purchase, sales, and trade agreements
- create smart rounding rules

Implement inventory management

Configure inventory management

- identify the purpose of inventory forecasting
- set up inventory and warehouse parameters
- configure and perform Quality control and Quality management processes
- configure inventory valuation reports
- configure ABC classification
- configure inventory closing components
- implement inventory breakdowns

Manage and process inventory activities

- create and process inventory and warehouse journals
- create and process transfer orders
- create and process chain orders
- manage direct delivery orders
- process quarantine orders
- process quality orders
- perform inventory closing and adjustments
- apply inventory blocking

Implement and manage supply chain processes

Implement procurement and sourcing

- create and manage purchase requisitions, requests for quotes (RFQs), and purchase orders (POs)
- create and manage vendor catalogs
- configure Purchase Order change management
- configure and apply vendor rebates
- implement and manage consignment inventory
- configure and test Vendor collaboration portal
- manage over and under deliveries and delivery schedules

Implement common sales and marketing features

- configure quotations, sales orders, and return orders
- configure sales groups and commissions
- configure and manage up-sell, cross-sell, discounts, and price groups
- configure customer and prospect searches
- implement and manage leads and prospects
- configure inter-company Trade relations

Implement advanced sales and marketing features

- configure brokers and royalties
- configure trade allowances and customer rebates
- implement and process foreign trade
- configure and process Vendor 1099

Implement warehouse management and transportation management and perform business processes

Configure warehouse management

- implement components for warehouse management
- implement location directives
- implement Inventory Statuses
- implement Waves
- implement Loads
- implement shipments
- implement Work
- implement mobile devices

Perform warehouse management processes

- identify inventory movement processes
- perform cycle counting
- use mobile devices for inbound and outbound processes
- implement containerization and packaging
- process inbound orders
- process outbound orders
- perform cluster picking
- process shipments
- identify and apply the replenishment process

Implement transportation management and perform business processes

- configure container management

- configure and manage transportation management
- perform planning and executing of loads and shipments
- configure and generate freight bills and invoices
- identify and configure route and rate engines
- configure and use dock appointment scheduling
- perform transportation processes by using the load planning workbench