

Exam MB-330: Microsoft Dynamics 365 Supply Chain Management – Skills Measured

This exam was updated on July 26, 2021. Following the current exam guide, we have included a version of the exam guide with Track Changes set to “On,” showing the changes that were made to the exam on that date.

Audience Profile

Candidates for this exam analyze business requirements and translate those requirements into fully realized business processes and solutions that implement industry best practices. Candidates serve as a key resource in implementing and configuring applications to meet business requirements.

Candidates for this exam have a fundamental understanding of accounting principles and financial operations of businesses, customer service, field service, manufacturing, retail, and supply chain management concepts. They typically specialize in one or more feature sets of Finance and Operations apps including finance, manufacturing, and supply chain management.

Candidates must have some knowledge of supply chain management practices, including procurement, trade, logistics, warehouse management, and transportation management.

Skills Measured

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

NOTE: Most questions cover features that are general availability (GA). The exam may contain questions on Preview features if those features are commonly used.

Implement product information management (25-30%)

Create and manage products

- create and release products and product variants
- create and apply product templates
- create bills of materials (BOMs)
- identify the purpose and capabilities of the product configuration models
- create and configure category hierarchies
- configure catch weights
- create direct-delivery products

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 and Global Trade Identification Number (GTIN) codes
- create product attributes
- configure product unit conversions
- configure default order settings

Manage inventory pricing and costing

- describe inventory costing methods
- configure Costing versions for standard and planned costs
- configure and default purchase prices, default sales prices, and trade agreements
- perform an inventory close

Implement Inventory management (15-20%)

Configure Inventory management

- set up inventory management parameters and journals
- configure and perform quality control and quality management processes
- configure inventory valuation reports
- configure ABC classifications
- configure inventory closing components
- implement inventory breakdowns

Manage and process inventory activities

- create and process journals including bill of materials, item arrival, transfer, movement, inventory adjustment, counting, and tag counting journals
- create and process transfer orders
- process quarantine orders
- process quality orders
- perform inventory closings and adjustments
- apply inventory blocking

Implement and manage Supply Chain processes (15-20%)

Implement Procurement and sourcing

- create and manage purchase requisitions, requests for quotes (RFQs), and purchase orders (POs)
- configure change management processes
- configure and apply vendor rebates
- implement and manage consignment inventory
- manage over and under deliveries and delivery schedules
- configure procurement categories and purchasing policies
- configure charges

Implement common sales and marketing features

- configure quotations, sales orders, and return orders
- configure sales groups and commissions
- configure and manage discounts and price groups
- configure customer, product, and prospect searches
- implement and manage leads and prospects
- configure and process inter-company trade relations documents

Implement warehouse management and transportation management (20-25%)

Configure warehouse management

- create sites, warehouses, locations, location formats, location profiles, location types, and zones
- implement location directives
- configure Inventory Statuses, unit sequence groups, and reservation hierarchies
- implement wave, load, and work templates
- configure mobile device menus, menu items, and display settings

Perform warehouse management processes

- identify inventory movement processes
- perform cycle counting
- process inbound and outbound orders
- process shipments
- describe the replenishment process including buyers' push and cross-docking

Implement transportation management

- configure shipping carriers and carrier groups
- perform planning and executing of loads and shipments
- configure and generate freight bills and invoices

- configure rout plans and guides
- configure route and rate engines
- configure and use dock appointment scheduling
- plan loads by using hub consolidation
- reconcile freight by using manual or automatic processes

Implement Planning Optimization (15-20%)

Configure master planning and forecasting

- describe available forecasting types
- configure planning optimization
- interpret Planning Optimization Fit Analysis results and take appropriate actions
- set up coverage groups and item coverage
- configure master planning parameters, master plan, forecast plans, and continuity plans
- define positive and negative days
- define action messages, delay messages, and time fences
- configure period templates

Run master plans and manage planned orders

- view and process planned orders
- set up and use the Supply Schedule form
- configure safety margins
- configure and process safety stock journals
- copy, edit, and delete master plans

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- ~~implement~~ Configure planning optimization
- interpret Planning Optimization Fit Analysis results and take appropriate actions
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Implement additional master planning features

- ~~set up~~ Implement inter-company master planning
- ~~implement demand base forecasting~~
- ~~implement planning optimization~~