

# Study guide for Exam MB-330: Microsoft Dynamics 365 Supply Chain Management Functional Consultant

## Purpose of this document

This study guide should help you understand what to expect on the exam and includes a summary of the topics the exam might cover and links to additional resources. The information and materials in this document should help you focus your studies as you prepare for the exam.

Useful links	Description
<a href="#">Review the skills measured as of March 17, 2023</a>	This list represents the skills measured AFTER the date provided. Study this list if you plan to take the exam AFTER that date.
<a href="#">Review the skills measured prior to March 17, 2023</a>	Study this list of skills if you take your exam PRIOR to the date provided.
<a href="#">Change log</a>	You can go directly to the change log if you want to see the changes that will be made on the date provided.
<a href="#">How to earn the certification</a>	Some certifications only require passing one exam, while others require passing multiple exams.
<a href="#">Certification renewal</a>	Microsoft associate, expert, and specialty certifications expire annually. You can renew by passing a <b>free</b> online assessment on Microsoft Learn.
<a href="#">Your Microsoft Learn profile</a>	Connecting your certification profile to Learn allows you to schedule and renew exams and share and print certificates.
<a href="#">Passing score</a>	A score of 700 or greater is required to pass.
<a href="#">Exam sandbox</a>	You can explore the exam environment by visiting our exam sandbox.

Useful links	Description
<a href="#">Request accommodations</a>	If you use assistive devices, require extra time, or need modification to any part of the exam experience, you can request an accommodation.
<a href="#">Take a practice test</a>	Are you ready to take the exam or do you need to study a bit more?

## Updates to the exam

Our exams are updated periodically to reflect skills that are required to perform a role. We have included two versions of the Skills Measured objectives depending on when you are taking the exam.

We always update the English language version of the exam first. Some exams are localized into other languages, and those are updated approximately eight weeks after the English version is updated. Other available languages are listed in the **Schedule Exam** section of the **Exam Details** webpage. If the exam isn't available in your preferred language, you can request an additional 30 minutes to complete the exam.

### Note

The bullets that follow each of the skills measured are intended to illustrate how we are assessing that skill. Related topics may be covered in the exam.

### Note

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

## Skills measured as of March 17, 2023

### Audience profile

Candidates for this exam are supply chain management functional consultants who design and configure Dynamics 365 Supply Chain Management and related tools and technologies to meet the requirements for a customer. They analyze business requirements and translate those requirements into fully realized business processes and solutions that implement industry-recommended practices. Candidates partner with architects, developers, consultants, and other stakeholders to deliver solutions that meet or exceed the needs of their customers.

Candidates implement product information management, sales and procurement processes, inventory and warehouse management, master planning, asset management, and transportation management.

- Implement product information management (20–25%)
- Implement inventory and asset management (25–30%)

- Implement and manage supply chain processes (15–20%)
- Implement warehouse management and transportation management (15–20%)
- Implement master planning (10–15%)

## **Implement product information management (20–25%)**

### **Create and manage products**

- Create and release products and product variants
- Create and apply product templates
- Create BOMs and BOM versions
- Create and configure category hierarchies
- Create and manage product states during the life cycle of a product
- Create product attributes

### **Configure prerequisites for products**

- Configure storage, tracking, and product dimension groups
- Create item model groups
- Describe use cases for item groups
- Configure reservation hierarchies
- Configure unit sequence groups

### **Configure additional product details**

- Create and assign bar codes and Global Trade Item Number (GTIN) codes
- Configure product unit conversions
- Configure default order settings
- Configure product filter codes for warehouse operations

### **Manage inventory pricing and costing**

- Describe costing versions for standard and planned costs
- Describe how price groups constrain pricing
- Configure items with standard costs
- Configure default item prices, purchase prices, and discounts in trade agreements

## **Implement inventory and asset management (25–30%)**

### **Configure inventory management**

- Create and manage inventory dimensions
- Configure Inventory management parameters and journals
- Configure inventory value reports
- Configure ABC classifications

## Manage and process inventory activities

- Create and process journals, including bill of materials, item arrival, transfer, movement, inventory adjustment, and counting, journals
- Create and process transfer orders
- Describe the inventory closing and adjustment process
- Configure and perform inventory closings and adjustments
- Apply inventory blocking manually
- Create batch disposition codes

## Manage quality

- Configure and process nonconformances
- Configure quality associations
- Configure components for the quality control process
- Process quality orders
- Process quarantine orders
- Describe use cases for inventory blocking using a quality order

## Configure asset management

- Create and manage work orders
- Create and configure assets
- View and manage capacity for work orders
- Configure work order settings
- Schedule preventive maintenance and reactive maintenance

## Implement and manage supply chain processes (15–20%)

### Implement procurement and sourcing

- Create and maintain vendors
- Describe use cases for procurement workflows
- Create and manage purchase requisitions, requests for quotation (RFQs), and purchase orders (POs)
- Create purchase agreements and vendor rebates
- Configure and process consignment inventory
- Manage over and under deliveries and delivery schedules
- Configure procurement categories, charge codes, and purchasing policies
- Configure vendor collaboration features
- Create and process vendor returns

### Implement landed cost

- Describe landed cost concepts and terminology
- Identify use cases for transportation management module and landed cost modules

## Implement common sales and marketing features

- Create and maintain customers
- Describe sales order reservations and order promising
- Configure sales agreements
- Configure and process sales quotations, sales orders, and sales returns
- Configure sales groups, commissions
- Configure and manage discounts and price groups
- Configure and process intercompany orders
- Configure customer rebates

## Implement warehouse management and transportation management (15–20%)

### Configure warehouse management

- Create sites, warehouses, locations, location formats, location profiles, location types, and zones
- Create and manage warehouse workers
- Configure work policies and work breaks
- Implement location directives
- Configure inventory statuses
- Configure wave, load, and work templates
- Configure mobile device menus, menu items, and display settings
- Create and print labels, including product, wave, and license plate labels

### Perform warehouse management processes

- Describe the replenishment process and cross-docking
- Describe the capabilities of the load planning workbench
- Configure and process inventory movements
- Create cycle counting work and perform cycle counting
- Process inbound and outbound orders
- Update inventory statuses
- Configure containerization and packaging options

### 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 route plans and guides
- Configure route and rate engines
- Configure and use dock appointment scheduling
- Reconcile freight by using manual or automatic processes

## Implement master planning (10–15%)

### Configure master planning and forecasting

- Describe the various types of forecasting available
- Configure Planning Optimization Add-in for Microsoft Dynamics 365 Supply Chain Management
- Describe planning optimization fit analysis results
- Set up coverage groups and item coverage
- Configure and maintain master planning parameters, master plans, and forecast plans
- Define positive and negative days
- Define action messages, delay messages, and time fences
- Configure period templates

### Manage master plans

- Run master planning
- View and process planned orders
- Set up and use the Supply Schedule form
- Configure safety margins
- Configure and process safety stock journals

## Study resources

We recommend that you train and get hands-on experience before you take the exam. We offer self-study options and classroom training as well as links to documentation, community sites, and videos.

Study resources	Links to learning and documentation
<b>Get trained</b>	<a href="#">Choose from self-paced learning paths and modules or take an instructor led course</a>
<b>Find documentation</b>	<a href="#">Dynamics 365 documentation and learning modules</a> <a href="#">Supply Chain Management home page</a>
<b>Ask a question</b>	<a href="#">Microsoft Q&amp;A   Microsoft Docs</a>
<b>Get community support</b>	<a href="#">Microsoft Dynamics Community</a>
<b>Follow Microsoft Learn</b>	<a href="#">Microsoft Learn - Microsoft Tech Community</a>
<b>Find a video</b>	<a href="#">Exam Readiness Zone on Learn Shows</a>

# Change log

Key to understanding the table: The topic groups (also known as functional groups) are in bold typeface followed by the objectives within each group. The table is a comparison between the two versions of the exam skills measured and the third column describes the extent of the changes.

Skill area prior to March 17, 2023	Skill area as of March 17, 2023	Change
Audience Profile		Minor
<b>Implement product information management</b>	<b>Implement product information management</b>	% decreased
Create and manage products	Create and manage products	Major
Configure prerequisites for products	Configure prerequisites for products	Major
Configure additional product details	Configure additional product details	Minor
Manage inventory pricing and costing	Manage inventory pricing and costing	Minor
<b>Implement inventory management</b>	<b>Implement inventory and asset management</b>	% increased
Configure inventory management	Configure inventory management	Minor
Manage and process inventory activities	Manage and process inventory activities	Major
Manage quality	Manage quality	Major
	Configure asset management	New
<b>Implement and manage supply chain processes</b>	<b>Implement and manage supply chain processes</b>	No change
Implement procurement and sourcing	Implement procurement and sourcing	Major
	Implement landed cost	New
Implement common sales and marketing features	Implement common sales and marketing features	Major
<b>Implement warehouse management and transportation management</b>	<b>Implement warehouse management and transportation management</b>	No change
Configure warehouse management	Configure warehouse management	Minor
Perform warehouse management processes	Perform warehouse management processes	Minor

Skill area prior to March 17, 2023	Skill area as of March 17, 2023	Change
Implement transportation management	Implement transportation management	Minor
<b>Implement master planning</b>	<b>Implement master planning</b>	% increased
Configure master planning and forecasting	Configure master planning and forecasting	Minor
Manage master plans	Manage master plans	Minor

## Skills measured prior to March 17, 2023

- Implement product information management (35–40%)
- Implement inventory management (20–25%)
- Implement and manage supply chain processes (15–20%)
- Implement warehouse management and transportation management (15–20%)
- Implement master planning (5–10%)

### Implement product information management (35–40%)

#### Create and manage products

- Create and release products and product variants
- Create and apply product templates
- Differentiate between bills of materials (BOMs) and formulas
- Create BOMs
- Identify the purpose and capabilities of the product configuration models
- Create and configure category hierarchies
- Create and manage product states during the life cycle of a product
- Create product attributes

#### Configure prerequisites for products

- Create and manage inventory dimensions
- Configure storage, tracking, and product dimension groups
- Create item model groups
- Create and print product labels
- Describe use cases for item groups
- Configure reservation hierarchies
- Configure unit sequence groups



## Configure additional product details

- Create and print labels, including product, wave, and license plate labels
- Create and assign bar codes and Global Trade Item Number (GTIN) codes
- Configure product unit conversions
- Configure default order settings
- Configure product filter codes

## Manage inventory pricing and costing

- Describe costing versions for standard and planned costs
- Describe how price groups constrain pricing
- Configure standard costs
- Configure default item prices, purchase prices, and discounts in trade agreements

## Implement inventory management (20–25%)

### Configure inventory management

- Configure Inventory management parameters and journals
- Configure inventory valuation reports
- Configure ABC classifications
- 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
- Configure and perform inventory closings
- Perform inventory closings and adjustments
- Apply inventory blocking

### Manage quality

- Configure and process nonconformances
- Configure quality associations
- Configure components for the quality control process
- Process quality orders
- Process quarantine orders
- Apply inventory blocking
- Create batch disposition codes

## **Implement and manage supply chain processes (15–20%)**

### **Implement procurement and sourcing**

- Describe use cases for procurement workflows
- Create and manage purchase requisitions, requests for quotes (RFQs), and purchase orders (POs)
- Create purchase agreements
- Create and process purchase orders that use change management
- 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
- Configure vendor collaboration features
- Create and process vendor returns

### **Implement common sales and marketing features**

- Describe how price groups link discounts to system tables
- Describe sales order reservations
- Configure sales agreements
- Configure and process quotations, sales orders, and return orders
- Configure quotations, sales orders, and return orders
- Configure sales groups, commissions, and workers
- Configure and manage discounts and price groups
- Configure customer, product, and prospect searches
- Implement and manage leads and prospects
- Configure and process intercompany orders
- Configure trade allowances and customer rebates

## **Implement warehouse management and transportation management (15–20%)**

### **Configure warehouse management**

- Create sites, warehouses, locations, location formats, location profiles, location types, and zones
- Create and manage warehouse workers
- Configure work policies and work breaks
- Implement location directives
- Configure inventory statuses
- Configure wave, load, and work templates
- Configure mobile device menus, menu items, and display settings

## Perform warehouse management processes

- Describe the replenishment process, including buyers' push and cross-docking
- Describe the capabilities of the load planning workbench
- Identify inventory movement processes
- Create cycle counting work and perform cycle counting
- Process shipments
- Update inventory statuses

## 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 route 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 master planning (5–10%)

### Configure master planning and forecasting

- Describe available forecasting types
- Configure Planning Optimization Add-in for Microsoft Dynamics 365 Supply Chain Management
- Interpret Planning Optimization fit analysis results, and take appropriate actions
- Set up coverage groups and item coverage
- Configure master planning parameters, master plans, forecast plans, and continuity plans
- Define positive and negative days
- Define action messages, delay messages, and time fences
- Configure period templates

### Manage master plans

- 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