

# MB6-897

## Microsoft Dynamics 365 Commerce

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**Exam number:** MB6-897

**Exam title:** Microsoft Dynamics 365 Commerce

**Publish date:**

**Language(s) this exam will be available in:**

**Audience:** (Sales and Presales Roles, IT professionals, Developers, Information workers, etc.):

**Technology:**

**Credit type** (example: MCSA):

**Exam provider** (VUE, Certiport, or both):

**The content of this exam was updated on February 4, 2020. Please continue scrolling to the red line section below to view the changes.**

### Exam Design

Candidates for this exam are Microsoft Dynamics 365 partners who set up and use the application functionality in Microsoft Dynamics 365 Commerce, and provide support for the application.

Candidates typically have a strong understanding of retail operations and POS, and experience deploying, maintaining, and using Microsoft Dynamics 365 Commerce.

### Skills measured

#### **Set up and Configure Organizational Parameters (20-25%)**

##### **Model an organization**

*May include but is not limited to:*

- Create models of organizations
- Create and configure organization hierarchies
- Create and modify retail operating units

### **Configure retail parameters**

*May include but is not limited to:*

- Set up a retail store set up info codes and sub codes
- Assign and translate info codes
- Configure units of measure and conversion
- Define retail parameters
- Set up sales tax and sales tax overrides
- Describe and configure payment methods
- Configure payment connectors
- Set up credit card payment services
- Configure full-text search
- Create number sequences for retail components

### **Configure workflows**

*May include but is not limited to:*

- Describe retail workflow features
- Configure workflow prerequisites
- Create and configure workflows
- Activate a workflow
- Associate workflows with an organization
- Monitor workflow status

### **Integrate stores**

*May include but is not limited to:*

- Configure and monitor Commerce Data Exchange services
- Test and troubleshoot Async client and server connectivity
- View retail channel transactions
- Set up up store locator groups

### **Manage retail channels**

*May include but is not limited to:*

- Build an online store
- Synchronize online store sales orders
- Create a call center
- Create retail stores
- Extend retail functionality for sales orders
- Describe cloud point-of-sale (CPOS) and modern retail point-of-sale (MPOS) capabilities

## **Set up and Configure Point of Sale (10-15%)**

### **Perform Point of Sale (POS) set up processes**

*May include but is not limited to:*

- Set up offline, functionality, receipt, hardware, visual, email notification, and channel integration POS profiles
- Configure a receipt format
- Set up data distribution
- Document business processes by using Task Recorder

### **Configure POS terminals**

*May include but is not limited to:*

- Configure POS permission groups
- Create registers and POS devices
- Create screen layouts that use button grids and images
- Manage drawer operations

### **Configure barcodes and labels**

*May include but is not limited to:*

- Create and view barcodes for specific products
- Print shelf labels
- Create barcode masks

## **Set up and Configure Products (15-20%)**

### **Configure basic product parameters**

*May include but is not limited to:*

- Create product dimensions and dimension groups
- Create a product; create and modify product attributes
- Create product features and assortments
- Create product relationship types and product relationships
- Create a product master or variant
- Create, assemble, disassemble, and sell product kits

### **Build product category hierarchies**

*May include but is not limited to:*

- Describe hierarchy types
- Create a category hierarchy
- Maintain hierarchies
- Bulk edit a category

### **Create and manage catalogs**

*May include but is not limited to:*

- Create a catalog
- Configure and analyze catalog layout
- Update, validate, approve and publish catalogs
- Create source codes

### **Manage delivery modes**

*May include but is not limited to:*

- Set up delivery modes
- Add channels to delivery modes
- Add products to delivery modes

### **Manage direct delivery**

*May include but is not limited to:*

- Set up direct delivery
- Configure products and sales orders for direct delivery
- Confirm direct delivery orders
- Create pick waves
- Set up the picking process
- Create a workbench
- Generate picking workbench sessions

### **Manage pricing discounts**

*May include but is not limited to:*

- Create category pricing rules
- Discount products based on catalogs
- Set up affiliated pricing
- Adjust prices
- Create price groups
- Configure mix and match discounts
- Create quantity discounts

### **Connect vendor information to products**

*May include but is not limited to:*

- Create a vendor catalog
- Set up price margin alerts on a product
- Define price points for products
- Add vendor product numbers to a product

## **Manage Retail Operations (15-20%)**

### **Manage workers**

*May include but is not limited to:*

- Create jobs
- Create positions
- Set up a worker
- Create and link address books
- Implement role-based security
- View and manage shifts

### **Generate retail information reports**

*May include but is not limited to:*

- Identify available reports
- Identify available workspaces
- Perform recency, frequency, and monetary (RFM) analysis

### **Implement customer loyalty schemes and gift cards**

*May include but is not limited to:*

- Describe the loyalty setup process
- Configure prerequisite components
- Create a customer loyalty scheme and program
- Process loyalty transactions
- Resolve loyalty card number conflicts
- Add products to loyalty schemes
- Set up physical and virtual gift cards
- Add funds to a gift card

### **Manage journals**

*May include but is not limited to:*

- Describe post statement actions
- Create and calculate a statement
- View posted statements
- Configure batch processes for statements

### **Manage inventory replenishment and fulfillment**

*May include but is not limited to:*

- Build replenishment rules
- Implement cross docking for product distribution
- Create a buyer's push
- Create a replenishment hierarchy
- Create service categories

- Set up distributed order management

### **Manage a call center**

*May include but is not limited to:*

- Create fraud rules
- Create a continuity program
- Create continuity orders
- Implement credit card and refund workbenches
- Configure check holds
- Set up credit limit checking
- Create rules for up-selling and cross-selling
- Set up target markets
- Create and use scripts

## **Conduct Retail Activities (25-30%)**

### **Perform POS operations**

*May include but is not limited to:*

- Conduct a transaction
- Override a price
- Identify reason codes and hold codes
- Hold and recall a transaction
- Clear a hold

### **Manage sale orders**

*May include but is not limited to:*

- View detailed status information for a sales order
- Identify sales order cancellation constraints
- Configure price matching
- Configure prepayment

### **Manage customers**

*May include but is not limited to:*

- Create a customer
- Check for duplicate customers
- Merge and unmerge customer records
- Create and configure cases
- Search for a customer

### **Manage drawer operations and daily operations**

*May include but is not limited to:*

- Perform opening procedures
- Conduct tender operations
- Perform overrides
- Perform closing procedures
- Open, pause, resume, and close shifts
- Cock in and out
- Create sales with cash or credit card payments
- Void transactions
- Accept returns

### **Manage installment billing**

*May include but is not limited to:*

- Set up and configure installment billing
- Create payment schedules
- Add installments to a sales order
- Process installment billing payments

### **Manage returns and Return Merchandise Authorization (RMA) processing**

*May include but is not limited to:*

- Identify steps in the RMA process
- Create an RMA
- Configure process return options
- Configure payment methods for returns

**See below changes as of February 4, 2020...**

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