

Exam MB6-897: Microsoft Dynamics 365 for Retail – Skills Measured

Audience Profile

Candidates for this exam are Microsoft Dynamics 365 partners who set up and use the application functionality in Microsoft Dynamics 365 for Retail 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 for Retail.

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).

Set up and configure organizational parameters (20–25%)

Model an organization

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

Configure retail parameters

- 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, and create number sequences for retail components

Configure workflows

- describe retail workflow features; configure workflow prerequisites; create and configure workflows, activate a workflow; associate workflows with an organization; monitor workflow status

Integrate stores

- configure and monitor Commerce Data Exchange services; test and troubleshoot Async client and server connectivity; view retail channel transactions; set up store locator groups

Manage retail channels

- 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

- 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

- 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

- create and view barcodes for specific products; print shelf labels; create barcode masks

Set up and Configure Products (15–20%)

Configure basic product parameters

- 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

- describe hierarchy types; create a category hierarchy; maintain hierarchies; bulk edit a category

Create and manage catalogs

- create a catalog; configure and analyze catalog layout; update, validate, approve and publish catalogs; create source codes

Manage delivery modes

- set up delivery modes; add channels to delivery modes; add products to delivery modes

Manage direct delivery

- 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

- 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

- 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

- 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

- identify available reports; identify available workspaces; perform recency, frequency, and monetary (RFM) analysis

Implement customer loyalty schemes and gift cards

- 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

- describe post statement actions; create and calculate a statement; view posted statements; configure batch processes for statements

Manage inventory replenishment and fulfillment

- 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

- 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

- conduct a transaction; override a price; identify reason codes and hold codes; hold and recall a transaction; clear a hold

Manage sale orders

- view detailed status information for a sales order; identify sales order cancellation constraints; configure price matching; configure prepayment

Manage customers

- 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

- perform opening procedures; conduct tender operations; perform overrides; perform closing procedures; open, pause, resume, and close shifts; clock in and out; create sales with cash or credit card payments; void transactions; accept returns

Manage installment billing

- 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

- identify steps in the RMA process; create an RMA; configure process return options; configure payment methods for returns