

Study guide for Exam MB-340: Microsoft Dynamics 365 Commerce 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
Review the skills measured as of September 19, 2022	This list represents the skills measured AFTER the date provided. Study this list if you plan to take the exam AFTER that date.
Review the skills measured prior to September 19, 2022	Study this list of skills if you take your exam PRIOR to the date provided.
Change log	You can go directly to the change log if you want to see the changes that will be made on the date provided.
How to earn the certification	Some certifications only require passing one exam, while others require passing multiple exams.
Certification renewal	Microsoft associate, expert, and specialty certifications expire annually. You can renew by passing a free online assessment on Microsoft Learn.
Your Microsoft Learn profile	Connecting your certification profile to Learn allows you to schedule and renew exams and share and print certificates.
Passing score	A score of 700 or greater is required to pass.
Exam sandbox	You can explore the exam environment by visiting our exam sandbox.

Useful links	Description
Request accommodations	If you use assistive devices, require extra time, or need modification to any part of the exam experience, you can request an accommodation.
Take a practice test	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 September 19, 2022

Audience profile

Candidates for this exam design, configure, and manage Dynamics 365 Commerce and provide ongoing support for the app.

Candidates have a strong understanding of unified commerce business operations. They may have experience deploying, using, and maintaining Dynamics 365 Commerce.

- Configure Dynamics 365 Commerce Headquarters (25-30%)
- Configure products, prices, discounts, loyalty, and affiliations (25-30%)
- Manage Point of Sales (POS) in Dynamics 365 Commerce (15-20%)
- Configure and manage Dynamics 365 Commerce call centers (10-15%)
- Manage e-commerce (15-20%)

Configure Dynamics 365 Commerce Headquarters (25–30%)

Configure prerequisites and commerce parameters

- Create employee and customer address books
- Configure and manage retail workers
- Assign address books to customers, channels, and workers
- Create email templates and email notification profiles
- Configure organizational hierarchies and hierarchy purposes
- Configure Commerce shared parameters
- Configure company-specific Commerce parameters

Describe and configure additional functionality

- Create and configure channel and sales order attributes
- Configure commissions and sales representatives
- Configure payment methods and card types
- Configure and manage gift cards
- Describe Omni-channel capabilities including payments, orders, returns, and refunds
- Configure data distribution
- Create info codes, sub-codes, and info code groups
- Describe Dynamics 365 Fraud Protection purchase protection, loss prevention, and account protection

Manage statements

- Describe advantages of using trickle feed-based posting
- Validate retail transactions by using the transaction consistency checker
- Configure and manage retail statement calculations and posting
- Troubleshoot statement posting issues

Configure Distributed Order Management (DOM)

- Configure fulfillment profiles
- Configure cost components including shipping, handling, and packaging costs
- Configure management rules and parameters
- Monitor fulfillment plans and order exceptions

Configure order fulfillment

- Configure modes of delivery including shipments, pick up, and carry out
- Configure curbside customer order pickup
- Configure charge codes, charge groups, and automatic charges
- Configure and assign order fulfillment groups

Configure products, prices, discounts, loyalty, and affiliations (25–30%)

Configure products and merchandising

- Configure product category hierarchies
- Configure product attributes and attribute groups
- Configure assortments
- Manage product labels and shelf labels
- Describe uses cases for recommendation types including product, personalized, Shop similar looks, and Shop similar descriptions recommendations
- Configure recommendations
- Configure warranty settings
- Configure inventory buffers and inventory levels
- Configure products and variants including configuring barcodes

Manage pricing

- Design and create price groups
- Configure pricing priorities
- Configure product pricing including smart rounding
- Configure catalog pricing
- Configure affiliation pricing
- Configure category pricing rules

Manage discounts and promotions

- Configure discount parameters
- Configure channel or customer-specific discounts
- Configure quantity, shipping, tender-based, and threshold-based discounts
- Configure discount concurrency rules
- Manage coupons

Manage customers, loyalty, and affiliations

- Configure client books
- Configure customer attributes
- Configure customer affiliations
- Configure loyalty programs, loyalty schemes, and reward points
- Manage loyalty tier calculations and processing

Manage Point of Sale (POS) in Dynamics 365 Commerce (15–20%)

Configure retail stores

- Create a retail store

- Configure POS registers and devices
- Configure retail profiles
- Configure sales tax overrides
- Configure Task Management lists and parameters
- Define cash management processes
- Define shifts and shift management processes
- Configure channel return policies
- Describe offline capabilities and limitations

Manage store inventory

- Configure availability calculations for products
- Manage inbound and outbound inventory operations within the POS
- Process customer pick-up and shipment orders
- Manage inventory processes including stock counts
- Look up product inventory
- Process serialized items

Perform POS operations

- Perform sales and order processes
- Perform end of day processes
- Reconcile store cash
- Monitor store productivity by using Task Management and reporting features

Configure and manage Dynamics 365 Commerce call centers (10–15%)

Configure call centers

- Create a call center
- Configure and publish product catalogs
- Create product catalog scripts
- Configure fraud conditions, rules, and variables to trigger order holds
- Configure fraud alerts

Configure continuity orders and installment billing

- Set up continuity programs and parameters
- Configure continuity order batch jobs
- Manage continuity child orders

Manage call centers

- Create, modify, and process sales orders
- Process call center payments

- Manage order holds
- Create return merchandise authorizations (RMAs)
- Process returns, exchanges, and replacements

Manage e-commerce (15–20%)

Configure an e-commerce channel

- Create an online store
- Configure an e-commerce site
- Configure channel assignments for an e-commerce site
- Configure ratings and reviews

Manage e-commerce content

- Configure URLs and aliases
- Configure product detail pages and category pages
- Manage site themes, page fragments, templates, layouts, and pages
- Upload and manage digital assets including videos and images
- Set focal points and attribute values for media assets
- Configure publish groups

Operate an e-commerce channel

- Create e-commerce orders
- Synchronize e-commerce orders
- Moderate ratings and reviews

Configure business-to-business (B2B) e-commerce

- Describe differences between B2B and business-to-consumer (B2C) solutions
- Describe use cases for organizational modeling hierarchies
- Manage business partners and business partner users
- Configure product quantity limits

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
Get trained	Choose from self-paced learning paths and modules or take an instructor led course
Find documentation	Dynamics 365 documentation and learning modules

Study resources	Links to learning and documentation
	Commerce
Ask a question	Microsoft Q&A Microsoft Docs
Get community support	Microsoft Dynamics Community
Follow Microsoft Learn	Microsoft Learn - Microsoft Tech Community

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 September 19, 2022	Skill area as of September 19, 2022	Changes
Audience profile		No change
Configure Dynamics 365 Commerce Headquarters	Configure Dynamics 365 Commerce Headquarters	No change
Configure prerequisites and commerce parameters	Configure prerequisites and commerce parameters	No change
Describe and configure additional functionality	Describe and configure additional functionality	Minor
Manage statements	Manage statements	No change
Configure Distributed Order Management (DOM)	Configure Distributed Order Management (DOM)	No change
Configure order fulfillment	Configure order fulfillment	No change
Configure products, prices, discounts, loyalty, and affiliations	Configure products, prices, discounts, loyalty, and affiliations	No change
Configure products and merchandising	Configure products and merchandising	No change
Manage pricing	Manage pricing	No change

Skill area prior to September 19, 2022	Skill area as of September 19, 2022	Changes
Manage discounts and promotions	Manage discounts and promotions	Minor
Manage customers, loyalty, and affiliations	Manage customers, loyalty, and affiliations	No change
Manage Point of Sale (POS) in Dynamics 365 Commerce	Manage Point of Sale (POS) in Dynamics 365 Commerce	No change
Configure retail stores	Configure retail stores	No change
Manage store inventory	Manage store inventory	Minor
Perform POS operations	Perform POS operations	No change
Configure and manage Dynamics 365 Commerce call centers	Configure and manage Dynamics 365 Commerce call centers	No change
Configure call centers	Configure call centers	No change
Configure continuity orders and installment billing	Configure continuity orders and installment billing	No change
Manage call centers	Manage call centers	No change
Manage e-commerce	Manage e-commerce	No change
Configure an e-commerce channel	Configure an e-commerce channel	No change
Manage e-commerce content	Manage e-commerce content	No change
Operate an e-commerce channel	Operate an e-commerce channel	No change
Configure business-to-business (B2B) e-commerce	Configure business-to-business (B2B) e-commerce	No change

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