

# Microsoft Certified: Dynamics 365 Commerce Functional Consultant Associate – Skills Measured

**This document contains the skills measured on the exams associated with this certification. It does not include any upcoming or recent changes that have been made to those skills. For more information about upcoming or recent changes, see the associated exam details page(s).**

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).

## Exam MB-300: Microsoft Dynamics 365: Core Finance and Operations

### Describe finance and operations apps, and extend apps by using Microsoft Power Platform technologies (20-25%)

#### Identify and use common apps, features, and functionality

- describe apps in the finance and operations portfolio
- describe the main components of Dynamics 365 Commerce
- describe use cases for and capabilities of workspaces and mobile workspaces
- describe case management
- describe global address book features and their use cases
- identify inquiry and report types available in a default installation
- describe use cases for the Business document management and electronic reporting features
- perform searches, save queries and views, create and use record templates, and create filters

#### Extend app functionality by using Microsoft Power Platform technologies

- identify use cases for Microsoft Dataverse
- identify use cases for Power Apps
- identify use cases for Power Automate
- identify use cases for Power BI
- identify use cases for Power Virtual Agents

## **Configure administrative features and workflows (30-35%)**

### **Implement security**

- distinguish between roles, duties, privileges, and permissions
- assign security roles to users based on requirements
- describe segregation of duties
- describe and use the security diagnostics tool

### **Design and create workflows and business events**

- describe use cases for workflows
- design and create workflows
- configure workflow properties, tasks, approvals, and elements
- configure queues, workflow assignment hierarchies, workflow parameters, and troubleshoot workflows
- troubleshoot workflows
- manage workflow versions
- Trigger Power Automate flows by using business events

### **Configure organization administration features**

- set up and configure legal entities and operating units
- configure and troubleshoot number sequences
- create organization hierarchies
- describe and apply user options
- configure document handling for attachments
- configure print management and form setup features

### **Configure system administration features**

- describe use cases for the Microsoft Excel Workbook Designer and the Microsoft Dynamics Office add-in
- configure email (SMTP/Exchange)
- create and maintain email templates
- describe use cases for Entity store
- create, export, and import personalization
- publish saved views
- set up and monitor batch jobs
- set up alerts

## **Manage finance and operations data (25-30%)**

## **Manage data**

- describe use cases for the Data Management framework
- describe use cases for projects, data entities, and templates
- copy configuration data between companies or legal entities by using the data management framework
- describe use cases for the dual-write feature

## **Describe the migration process**

- identify common migration scenarios and tools in finance and operations apps
- identify relevant data entities and elements based on given scenarios
- identify data migration requirements

## **Prepare data for migration and migrate data to finance and operations apps**

- identify types of data including master, transactional, reference, and parametric
- generate field mapping between source and target data structures
- import or export data by using the data management framework
- support the transition between the existing and migrated systems
- perform a test migration and validate output from the process
- implement data task automation

## **Validate and support solutions (20-25%)**

### **Test solutions**

- describe types of testing, including unit, regression, functional, and end-to-end
- describe capabilities of available testing tools
- track work items through a project implementation by using Azure DevOps
- create test cases and test plans by using Azure DevOps
- automate and manage test cases by using the Regression Suite Automation Tool (RSAT)
- create test scripts by using Task recorder and upload scripts to Business process modeler or Azure DevOps

### **Describe and use Lifecycle Services tools**

- identify use cases for project asset libraries and shared asset libraries
- describe environment purposes and topologies
- differentiate between Tier 1 environment and other tiers
- describe use cases for Business process modeler libraries
- describe the types of environments including sandbox, test, and production
- report production outages

- create and save trace files to troubleshoot performance issues
- describe the impacts of Dynamics 365 One Version service updates on projects

## **Exam MB-340: Microsoft Dynamics 365 Commerce Functional Consultant**

### **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, and returns
- 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 and product catalogs
- 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
- 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