Exam MB-340: Microsoft Dynamics 365 Commerce Functional Consultant – Skills Measured

Audience Profile

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

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

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).

Configure Dynamics 365 Commerce Headquarters (20-25%)

Configure prerequisites and commerce parameters

- create employee and customer address books
- configure retail workers
- retire retail workers
- assign address books to customers, channels, and workers
- create email templates and email notification profiles
- configure organizational hierarchies and hierarchy purposes
- configure shared commerce parameters
- configure commerce parameters for individual legal entities

Configure additional options

- create and configure channel and sales order attributes
- configure commissions
- configure payment methods and card types
- configure data distribution
- create info codes, sub-codes, and info code groups
- configure modes of delivery including shipments, pick up, and carry out

- configure charge codes, charge groups, and automatic charges

Manage statements

- 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 DOM fulfillment profiles
- configure DOM cost components including shipping, handling, and packaging costs
- configure DOM management rules and parameters
- monitor DOM fulfillment plans and order exceptions

Configure products, prices, discounts, loyalty, and affiliations (20-25%)

Configure products and merchandising

- configure the commerce product category hierarchy
- configure other product category hierarchies
- configure assortments
- configure product attributes and attribute groups
- configure product catalogs
- manage product labels and shelf labels
- configure product recommendations
- configure warranty settings

Manage pricing

- design a strategy for price groups and create price groups
- configure product pricing
- 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
- configure pricing priorities

- 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

Manage store inventory

- configure availability calculations for products
- manage inbound and outbound inventory operations
- process customer pick-up and shipment orders
- process stock counts in POS
- look up product inventory data in POS

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 and process call center 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 for e-commerce sites
- configure product detail pages and category pages for an e-commerce site
- 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