

Microsoft Certified: Dynamics 365 Supply Chain Management 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 follow 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-330: Microsoft Dynamics 365 Supply Chain Management Functional Consultant

Implement product information management (35-40%)

Create and manage products

- create and release products and product variants
- create and apply product templates
- differentiate between bills of materials (BOMs) and formulas
- create BOMs
- identify the purpose and capabilities of the product configuration models
- create and configure category hierarchies
- create and manage product states during the life cycle of a product
- create product attributes

Configure prerequisites for products

- create and manage inventory dimensions
- configure storage, tracking, and product dimension groups
- create item model groups
- create and print product labels
- describe use cases for item groups
- configure reservation hierarchies
- configure unit sequence groups

Configure additional product details

- create and print labels, including product, wave, and license plate labels
- create and assign bar codes and Global Trade Item Number (GTIN) codes
- configure product unit conversions
- configure default order settings
- configure product filter codes

Manage inventory pricing and costing

- describe costing versions for standard and planned costs
- describe how price groups constrain pricing

- configure standard costs
- configure default item prices, purchase prices, and discounts in trade agreements

Implement Inventory management (20-25 %)

Configure Inventory management

- configure inventory management parameters and journals
- configure inventory valuation reports
- configure ABC classifications
- implement inventory breakdowns

Manage and process inventory activities

- create and process journals including bill of materials, item arrival, transfer, movement, inventory adjustment, counting, and tag counting journals
- create and process transfer orders
- configure and perform inventory closings
- perform inventory closings and adjustments
- apply inventory blocking

Manage quality

- configure and process nonconformances
- configure quality associations
- configure components for the quality control process
- process quality orders
- process quarantine orders
- apply inventory blocking
- create batch disposition codes

Implement and manage Supply Chain processes (15-20%)

Implement procurement and sourcing

- describe use cases for procurement workflows
- create and manage purchase requisitions, requests for quotes (RFQs), and purchase orders (POs)
- create purchase agreements
- create and process purchase orders that use change management
- configure and apply vendor rebates

- implement and manage consignment inventory
- manage over and under deliveries and delivery schedules
- configure procurement categories and purchasing policies
- configure charges
- configure vendor collaboration features
- create and process vendor returns

Implement common sales and marketing features

- describe how price groups link discounts to system tables
- describe sales order reservations
- configure sales agreements
- configure and process quotations, sales orders, and return orders
- configure quotations, sales orders, and return orders
- configure sales groups, commissions, and workers
- configure and manage discounts and price groups
- configure customer, product, and prospect searches
- implement and manage leads and prospects
- configure and process intercompany orders
- configure trade allowances and customer rebates

Implement warehouse management and transportation management (15-20 %)

Configure warehouse management

- create sites, warehouses, locations, location formats, location profiles, location types, and zones
- create and manage warehouse workers
- configure work policies and work breaks
- implement location directives
- configure inventory statuses
- configure wave, load, and work templates
- configure mobile device menus, menu items, and display settings

Perform warehouse management processes

- describe the replenishment process, including buyers' push and cross-docking
- describe the capabilities of the load planning workbench
- identify inventory movement processes

- create cycle counting work and perform cycle counting
- process shipments
- update inventory statuses

Implement transportation management

- configure shipping carriers and carrier groups
- perform planning and executing of loads and shipments
- configure and generate freight bills and invoices
- configure route plans and guides
- configure route and rate engines
- configure and use dock appointment scheduling
- plan loads by using hub consolidation
- reconcile freight by using manual or automatic processes

Implement Master Planning (5-10 %)

Configure master planning and forecasting

- describe available forecasting types
- configure Planning Optimization Add-in for Microsoft Dynamics 365 Supply Chain Management
- interpret Planning Optimization Fit Analysis results and take appropriate actions
- set up coverage groups and item coverage
- configure master planning parameters, master plans, forecast plans, and continuity plans
- define positive and negative days
- define action messages, delay messages, and time fences
- configure period templates

Manage master plans

- view and process planned orders
- set up and use the Supply Schedule form
- configure safety margins
- configure and process safety stock journals
- copy, edit, and delete master plans