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Learning Style: Virtual Classroom

Technology: Microsoft

Difficulty: Intermediate

Course Duration: 3 Days

Microsoft Dynamics 365 Commerce Functional Consultant (MB-340)



About this Course:

Dynamics 365 Commerce functional consultants set up and use the application functionality in Microsoft Dynamics 365 Commerce, and provide support for the application. The functional consultant typically has a strong understanding of unified commerce business operations, and experience configuring, deploying, maintaining, and using Microsoft Dynamics 365 Commerce. This four-day course

covers the essentials for the role.

Course Objectives:

- Configure Dynamics 365 Commerce Headquarters
- Configure products, prices, discounts, loyalty, and affiliations
- Manage Point of Sale (POS) in Dynamics 365 Commerce
- Configure and Manage Dynamics 365 Commerce call centers
- Manage e-commerce

Audience:

The audience for this course is either: a Dynamics 365 consultant who wants to learn Commerce, or a retail analyst with core Dynamics 365 experience who wants to apply their skills to the Dynamics product family.

Prerequisites:

- Core Microsoft Dynamics 365 skills (or MB-300 certification)
- General understanding of Commerce principles

Course Outline:

Module 1: Get started with Dynamics 365 Commerce

Dynamics 365 Commerce delivers a complete omnichannel solution that unifies the operating system , in-store, and e-Commerce experiences to personalize customer engagement, increase employee productivity, optimize operations, and deliver better business outcomes.

Lessons

- Introduction to Unified Commerce platform
- Dynamics 365 Commerce architecture
- Deployment of Dynamics 365 Commerce
- Hardware and peripherals

Lab : Group discussion on hardware

Lab : Group discussion on store topologies

After completing this module, students will be able to:

- Describe the Dynamics 365 Commerce platform and its evolution from Dynamics 365 Retail
- Explain the different commerce channels and their purposes
- Understand the Commerce platform architecture and deployment process

Module 2: Configure Commerce Headquarters

Before Dynamics 365 Commerce channels can be created and used, several prerequisites must be completed. Configuration of those prerequisites enables successful transactions in commerce channels.

Lessons

- Configure prerequisites and Commerce parameters
- Configure and maintain payment processing
- Configure Commerce Data Exchange (CDX)
- Configure delivery modes and charges
- Configure and work with statements

Lab : Group discussion on selection of the right payment connector

Lab : Configure prerequisites for Online store channel

After completing this module, students will be able to:

- Configure Dynamics 365 Commerce
- Understand the general configuration prerequisites for Dynamics 365 Commerce

Module 3: Products and Merchandising

Dynamics 365 Commerce is an end-to-end merchandising solution that you can use to manage product lifecycles from creation to maintenance, distribution, and publishing through commerce channels. You can consistently complete processes by using embedded workflows.

Lessons

- Product information management
- Merchandising in Dynamics 365 Commerce
- Product recommendations and product discovery

Lab : Configure a retail product

Lab : Group discussion on Product discoverability

After completing this module, students will be able to:

- Have discovered how to configure products
- Create catalogs and manage product images
- Know how to work with attributes and assortments
- Understand end-to-end merchandising in Dynamics 365 Commerce

Module 4: Retail Pricing

Dynamics 365 Commerce includes an omnichannel pricing engine. You can configure the system so that all commerce channels use the same options. You can also create channel-specific pricing, discounts coupons, and promotions.

Lessons

- Manage Pricing
- Manage discounts and promotions

Lab : Retail discounts

Lab : Create and simulate sales pricing

After completing this module, students will be able to:

- Know about the retail pricing engine and its specifics
- Configure price groups
- Work with retail discount types
- Understand price reports
- Understand sales price and price adjustments

Module 5: Loyalty and customer experience

The goal of any retail business is to increase sales while also increasing customer satisfaction with the retailer’s brand. Proper customer management and loyalty policies empower sales associates to become trusted advisors and establish long-term relationships with their customers. Dynamics 365 Commerce helps organizations to gain a unified view of customers and manage exciting customer incentives including affiliations and loyalty programs.

Lessons

- Customer Management
- Loyalty and affiliations

Lab : Configure a new Loyalty scheme

Lab : Group discussion on Importance of clienteling in Retail

After completing this module, students will be able to:

- Know the purpose of assisted selling
- Work with the affiliations feature
- Explain the loyalty functionality
- Understand the clienteling solution in Dynamics 365 Commerce

Module 6: Point of sale

Dynamics 365 Commerce allows for the centralized configuration and management of multiple Commerce channels. The requirements for brick-and-mortar operations

are unique compared to other Commerce channels. Transactions can be performed in Dynamics 365 Commerce point of sale (POS) to register sales and returns in several ways.

Lessons

- Introduction to POS
- Channel Setup
- Configure Cash and Shift management
- Worker Setup
- Point of Sale Setup
- Customer management at POS
- Transaction processing
- Inventory processing
- End of day processing
- Reporting
- Configure and work with Task management
- Test POS
- Maintain registers and devices
- Localization

Lab : Create a customer pick up order and pick up the order

Lab : Set up a new POS register and device

After completing this module, students will be able to:

- Know how to design receipt and screen layouts.
- Know how to configure a worker’s card and assign operations and permissions.
- Know how to create a retail store.
- Activate Modern POS (MPOS) and Cloud POS (CPOS).
- Create a cash and carry transaction for a walk-in customer.
- Have created a customer order.
- Understand how to cancel and return transactions.
- Suspend and recall a transaction.
- Know how to work with serialized items.
- Know how to work with inbound and outbound inventory operations in POS .and how to receive
- Know how to create and manage stock counting.
- Know how to configure profiles and create registers and devices.

Module 7: Configure and work with call centers in Dynamics 365 Commerce

Dynamics 365 Commerce is an omnichannel solution that provides a call center channel with capabilities for order capturing, payment processing and customer service.

Lessons

- Configure channel
- Configure Product Catalogs
- Configure Order Holds
- Create call center orders
- Configure call center directed selling
- Configure Returns and Refunds
- Configure continuity orders and installment billing

Lab : Create transactions in a call center

Lab : Create a call center order

After completing this module, students will be able to:

- Assign to a channel: users, payment methods, price groups, and modes of delivery
- Know how to work with call center features
- Create upsell and cross-sell items
- Understand how to create, cancel, and return a call center order
- Describe how to put call center order on hold and release it from hold
- Create a call center channel

Module 8: Work with E-Commerce in Dynamics 365 Commerce

Dynamics 365 Commerce adds a native e-commerce toolset to the existing Dynamics 365 capabilities. The toolset is designed to streamline the organizations' commerce business with an end-to-end solution across traditional and emerging channels. Capabilities include built-in authoring and development tools, engaging and intelligent digital storefronts, and a connected marketing and commerce platform.

Lessons

- Describe e-commerce core capabilities
- Configure an E-Commerce Channel in Dynamics 365 HQ
- Configure an E-Commerce site
- Configure and manage E-Commerce site content
- Describe & Demonstrate digital asset management
- Configure business-to-business (B2B) site
- Configure Ratings and reviews functionality
- Demonstrate E-Commerce Order Processing

Lab : Create and manage an e-commerce site

Lab : Configure an online store channel

After completing this module, students will:

- Understand how to use the site builder tool to create and manage an e-commerce site

- Have learned about using the Module library and different site elements
- Have learned how to create and manage an online store

Module 9: Manage order fulfillment and inventory in Dynamics 365 Commerce

Dynamics 365 Commerce provides functionality to manage store inventory, including store inventory replenishment capabilities, inbound and outbound store inventory operations, and order fulfillment.

Lessons

- Configure and work with Stock replenishment
- Configure and work with Order fulfillment

Lab : Set up a rule for DOM & see it in action

Lab : DOM Scenarios, Rules and examples

After completing this module, students will be able to:

- Describe the distributed order management functionality
- Configure distributed order management
- Understand the order fulfillment functionality that enables omni-channel order fulfillment

Module 10: Work with Dynamics 365 Fraud Protection

Dynamics 365 Fraud Protection is a cloud-based solution that is designed for e-commerce, brick-and-mortar stores, and omnichannel merchants to help protect their revenue and reputation by providing tools and capabilities to decrease fraud and abuse, reduce operational expenses, and increase acceptance rates, all while safeguarding user accounts from fraud exposure.

Lessons

- Overview of Dynamics Fraud Protection
- Describe Dynamics Fraud Protection Services
- Configure and work with Dynamics Fraud Protection with Dynamics 365 Commerce

Lab : Group discussion: A fraud protection case study

Lab : Group discussion: Discuss options for identifying and preventing fraud

After completing this module, students will:

- Have discovered the core capabilities of Dynamics 365 Fraud Protection.
- Understand the basics of how Dynamics 365 Fraud Protection works.

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