

# Exam MB-330: Microsoft Dynamics 365 Supply Chain Management Functional Consultant – Skills Measured

**This exam was updated on December 10, 2021. Following the current exam guide, we have included a version of the exam guide with Track Changes set to “On,” showing the changes that were made to the exam on that date.**

**NOTE: Passing score: 700. Learn more about exam scores [here](#).**

## Audience Profile

Candidates for this exam are supply chain management functional consultants who design and configure Dynamics 365 Supply Chain Management and related tools and technologies to meet the requirements for a customer. They analyze business requirements and translate those requirements into fully realized business processes and solutions that implement industry-recommended practices. Candidates partner with architects, developers, administrators, and other stakeholders to deliver solutions that meet or exceed the needs of their customers.

Candidates implement product information management, sales and procurement processes, inventory and warehouse management, master planning, and transportation management.

## Skills Measured

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: Most questions cover features that are general availability (GA). The exam may contain questions on Preview features if those features are commonly used.

## 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

**The exam guide below shows the changes that were implemented on December 10, 2021. Note that the audience profile has been updated.**

### **Audience Profile**

Candidates for this exam analyze business requirements and translate those requirements into fully realized business processes and solutions that implement industry best practices. Candidates serve as a key resource in implementing and configuring applications to meet business requirements.

Candidates for this exam have a fundamental understanding of accounting principles and financial operations of businesses, customer service, field service, manufacturing, retail, and supply chain management concepts. They typically specialize in one or more feature sets of Finance and Operations apps including finance, manufacturing, and supply chain management.

Candidates must have some knowledge of supply chain management practices, including procurement, trade, logistics, warehouse management, and transportation management.

### **Skills Measured**

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: Most questions cover features that are general availability (GA). The exam may contain questions on Preview features if those features are commonly used.

## **Implement product information management (25-3035-40%)**

### **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 ~~bills of materials~~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 catch weights~~
- ~~create direct-delivery products~~

### **Configure prerequisites for products~~products for supply chain management~~**

- create and manage inventory dimensions
- configure storage, tracking, and product dimension groups
- create ~~item groups and~~item model groups
- create and print product labels
- describe use cases for item groups
- configure reservation hierarchies
- configure unit sequence groups
- ~~create and assign bar codes and Global Trade Identification Number (GTIN) codes~~
- ~~create product attributes~~
- ~~configure product unit conversions~~
- ~~configure default order settings~~

### **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
- ~~describe inventory costing methods~~
- ~~configure Costing versions for standard and planned costs~~
- configure ~~and~~ default item prices, purchase prices, ~~default sales prices, and~~ discounts in trade agreements
- ~~perform an inventory close~~

## Implement Inventory management (1520-2025 %)

### Configure Inventory management

- ~~set up~~ Configure inventory management parameters and journals
- ~~configure and perform quality control and quality management processes~~
- configure inventory valuation reports
- configure ABC classifications
- ~~configure inventory closing components~~
- 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
- ~~—~~
- ~~process quarantine orders~~
- ~~process quality orders~~
- 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~~ 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 change management processes~~
- 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, ~~and~~ 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 inter-company orders
- configure trade allowances and customer rebates
- ~~configure and process inter-company trade relations documents~~



## Implement warehouse management and transportation management (~~2015-25-20~~ %)

### 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\_inVENTORY\_Statusestatuses, unit sequence groups, and reservation hierarchies~~
- ~~implement-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 p~~Perform cycle counting
- ~~process inbound and outbound orders~~
- process shipments
- ~~describe the replenishment process including buyers' push and cross-docking~~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 e 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 ~~Planning Optimization~~Master Planning (~~15-20-10~~ %)

### Configure master planning and forecasting

- describe available forecasting types
- configure ~~planning~~ [Planning Optimization Add-in for Microsoft Dynamics 365 Supply Chain Management](#) optimization
- 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

### **Run-Manage master plans and manage planned orders**

- 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