

**Microsoft Dynamics 365 Retails Functional Training Curriculum**

**STRUCTURE**

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**Microsoft Dynamics 365 Retails Functional Training Curriculum**

“Our MS 365 Retails functional training makes sure that you are way ahead of your colleagues. So, hurry up and enroll today to work smartly.”

**About Croma Campus:**

Croma Campus Training & Development Private Limited is an education platform since 2010 providing rigorous industry-relevant programs designed and delivered in collaboration with world-class faculty and industry.

* Hands-On Live Projects
* Simulation Test Papers
* Industry Cases Studies
* 61,640+ Satisfied Learners
* 140+ Training Courses
* 100% Certification Passing Rate
* Live Instructor Classroom / Online Training
* 100% Placement Assistance

**Course Objectives:**

* Prepare yourself for the certification exam and clear your certification exam in the first attempt.
* Add an attractive credential in your resume that is really appreciated by Companies.
* Improve your overall Microsoft 365 retail functional skills, and explore more job prospects with better salary packages.
* Boost your social media profiles especially LinkedIn by adding this certification and become one of the top persons to be chosen by industries.

**Course Description:**

Use this certification to prove your skills and help advance your career, if you have experience as a functional consultant who analyses business requirements and translates them into successful business processes and solutions based on industry best practices.

Candidates for this exam are Microsoft Dynamics 365 partners who set up and use the application functionality in Microsoft Dynamics 365 for Retail and provide support for the application.

Candidates typically have a strong understanding of retail operations and POS, and experience deploying, maintaining, and using Microsoft Dynamics 365 for Retail.

**Certification Structure:**

* Set up and configure organizational parameters (20-25%)
* Set up and Configure Point of Sale (10-15%)
* Set up and Configure Products (15-20%)
* Manage Retail Operations (15-20%)
* Conduct Retail Activities (25-30%)

**Croma Campus Training Program Deliverables:**

* **Session Recordings** - Original Class Room Voice & Video Recording
* **Training Material** - Soft Copy Handbooks
* **Assignments** | Multiple Hands-on Exercises
* **Test Papers** - We provide **Practice Test** as part of our course to help you prepare for the actual certification exam.
* **Live Case Studies**
* **Live Projects** - Hands-on exercises and Project work. You will work on real time industry-oriented projects and assignments for each module to practice.
* **Key focus on Hands-on exercises and Project work**. You will work on real time industry-oriented projects.
* Faculty with more than **10+ Years of Experience** in the Industry.
* **Technical Resume Designing & Job Assistance:** With more than 100+ Clients across the Globe and we help learners to get a good job in their respective field. We also help learners with resume preparation.
* **Interview Q&A**
* **About Croma Campus Training Certificate:** Croma Campus will provide you with an industry-recognized (Certified by **ISO 9001:2015** & **E-Cell IIT Jodhpur**) course completion certificate which has lifelong validity.
* **How I Unlock my Croma Campus Certificate:** Attend Complete Batch & Submit at least One Completed Project.

**Course Content:**

**Module 1: Set up and configure organizational parameters (20–25%)**

**Model an Organization**

* Create models of organizations; create and configure organization hierarchies; create and modify retail operating units

**Configure Retail Parameters**

* Set up a retail store set up info codes and sub codes; assign and translate into codes; configure units of measure and conversion; define retail parameters; set up sales tax and sales tax overrides; describe and configure payment methods; configure payment connectors; set up credit card payment services; configure full-text search, and create number sequences for retail components

**Configure Workflows**

* Describe retail workflow features; configure workflow prerequisites; create and configure workflows, activate a workflow; associate workflows with an organization; monitor workflow status

**Integrate Stores**

* Configure and monitor Commerce Data Exchange services; test and troubleshoot asynchronous client and server connectivity; view retail channel transactions; set up store locator groups

**Manage Retail Channels**

* Build an online store; synchronize online store sales orders; create a call center; create retail stores; extend retail functionality for sales orders; describe cloud point-of-sale (CPOS) and modern retail point-of-sale (MPOS) capabilities.

**Module 2: Set up and Configure Point of Sale (10-15%)**

**Perform Point of Sale (POS) Set-up Processes**

* Set up offline, functionality, receipt, hardware, visual, email notification, and channel integration POS profiles; configure a receipt format; set up data distribution; document business processes by using Task Recorder

**Configure POS Terminals**

* Configure POS permission groups; create registers and POS devices; create screen layouts that use button grids and images; manage drawer operations

**Configure Barcodes and Labels**

* Create and view barcodes for specific products; print shelf labels; create barcode masks

**Module 3: Set up and Configure Products (15–20%)**

**Configure Basic Product Parameters**

* Create product dimensions and dimension groups; create a product; create and modify product attributes; create product features and assortments; create product relationship types and product relationships; create a product master or variant; create, assemble, disassemble, and sell product kits

**Build Product Category Hierarchies**

* Describe hierarchy types; create a category hierarchy; maintain hierarchies; bulk edit a category

**Create and Manage Catalog**

* Create a catalog; configure and analyze catalog layout; update, validate, approve and publish catalog; create source codes

**Manage Delivery Modes**

* Set up delivery modes; add channels to delivery modes; add products to delivery modes

**Manage Direct Delivery**

* Set up direct delivery; configure products and sales orders for direct delivery; confirm direct delivery orders; create pick waves; set up the picking process; create a workbench; generate picking workbench sessions

**Manage Pricing Discounts**

* Create category pricing rules; discount products based on catalog; set up affiliated pricing; adjust prices; create price groups; configure mix and match discounts; create quantity discounts

**Connect Vendor Information to Products**

* Create a vendor catalog; set up price margin alerts on a product; define price points for products; add vendor product numbers to a product

**Module 4: Manage Retail Operations (15–20%)**

**Manage Workers**

* Create jobs; create positions; set up a worker; create and link address books; implement role-based security; view and manage shifts

**Generate Retail Information Reports**

* Identify available reports; identify available workspaces; perform regency, frequency, and monetary (RFM) analysis

**Implement Customer Loyalty Schemes and Gift Cards**

* Describe the loyalty setup process; configure prerequisite components; create a customer loyalty scheme and program; process loyalty transactions; resolve loyalty card number conflicts; add products to loyalty schemes; set up physical and virtual gift cards; add funds to a gift card

**Manage Journals**

* Describe post statement actions; create and calculate a statement; view posted statements; configure batch processes for statements

**Manage Inventory Replenishment and Fulfilment**

* Build replenishment rules; implement cross docking for product distribution; create a buyer’s push; create a replenishment hierarchy; create service categories; set up distributed order management

**Manage a Call Center**

* Create fraud rules; create a continuity program; create continuity orders; implement credit card and refund workbenches; configure check holds; set up credit limit checking; create rules for up-selling and cross-selling; set up target markets; create and use scripts

**Module 5: Conduct Retail Activities (25–30%)**

**Perform POS Operations**

* Conduct a transaction; override a price; identify reason codes and hold codes; hold and recall a transaction; clear a hold

**Manage Sale Orders**

* View detailed status information for a sales order; identify sales order cancellation constraints; configure price matching; configure prepayment

**Manage Customers**

* Create a customer; check for duplicate customers; merge and unmerge customer records; create and configure cases; search for a customer

**Manage Drawer Operations and Daily Operations**

* Perform opening procedures; conduct tender operations; perform overrides; perform closing procedures; open, pause, resume, and close shifts; clock in and out; create sales with cash or credit card payments; void transactions; accept returns

**Manage Instalment Billing**

* Set up and configure instalment billing; create payment schedules; add instalments to a sales order; process instalment billing payments

**Manage Returns and Return Merchandise Authorization (RMA) Processing**

* Identify steps in the RMA process; create an RMA; configure process return options; configure payment methods for returns

**Module 6: Placement Guide**

* Tips to clear an Interview
* Common Interview questions and answers
* Microsoft Dynamics 365 Retails Functional Interview Questions
* Resume Building Guide
* Career roadmap and certifications
* Attempt for the Global Certification Exam
* Start applying for Jobs