ProTech Professional Technical Services, Inc.

Microsoft Dynamics 365 Commerce Functional Consultant

Course Summary

Description

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.

Objectives

At the end of this course, students will be able to:
- 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.

Topics

- Get started with Dynamics 365 Commerce
- Configure Commerce Headquarters
- Products and Merchandising
- Retail Pricing
- Loyalty and customer experience
- Point of sale
- Configure and work with call centers in Dynamics 365 Commerce
- Work with E-Commerce in Dynamics 365 Commerce
- Manage order fulfillment and inventory in Dynamics 365 Commerce
- Work with Dynamics 365 Fraud Protection

Audience

This course is intended for 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

Before attending this course, students must have:
- Core Microsoft Dynamics 365 skills
- General understanding of Commerce principles

Duration

Four days

Course Outline

I. 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.

- A. Introduction to Unified Commerce platform
- B. Dynamics 365 Commerce architecture
- C. Deployment of Dynamics 365 Commerce
- D. Hardware and peripherals
- E. Lab: Group discussion on hardware
- F. Lab: Group discussion on store topologies

II. 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.

- A. Configure prerequisites and Commerce parameters
- B. Configure and maintain payment processing
- C. Configure commerce Data Exchange (CDX)
- D. Configure delivery modes and charges
- E. Configure and work with statements
- F. Lab: Group discussion on selection of the right payment connector
- G. Lab: Configure prerequisites for Online store channel

III. 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.

- A. Product information management
- B. Merchandising in Dynamics 365 Commerce
- C. Product recommendations and product discovery
- D. Lab: Configure a retail product
- E. Lab: Group discussion on Product discoverability

IV. 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.

- A. Manage Pricing
- B. Manage discounts and promotions
- C. Lab: Retail discounts
- D. Lab: Create and simulate sales pricing

V. 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.

- A. Customer Management
- B. Loyalty and affiliations
- C. Lab: Configure a new Loyalty scheme
- D. Lab: Group discussion on Importance of clienteling in Retail

VI. 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.

- A. Introduction to POS
- B. Channel Setup
- C. Configure cash and Shift management
- D. Worker Setup
- E. Point of Sale Setup
- F. Customer management at POS
- G. Transaction processing
- H. Inventory processing
- I. End of day processing
- J. Reporting
- K. Configure and work with Task management
- L. Test POS
- M. Maintain registers and devices
- N. Localization
- O. Lab: Create a customer pick up order and pick up the order
- P. Lab: Set up a new POS register and device

Course Outline

Course Outline (cont)

VII. Configure and work with call centers in Dynamics 365

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

- A. Configure channel
- B. Configure Product Catalogs
- C. Configure Order Holds
- D. Create call center orders
- E. Configure call center directed selling
- F. Configure Returns and Refunds
- G. Configure continuity orders and installment billing
- H. Lab: Create transactions in a call center
- I. Lab: Create a call center order

VIII. 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.

- A. Describe e-commerce core capabilities
- B. Configure an E-Commerce Channel in Dynamics 365 HQ
- C. Configure an E-Commerce site
- D. Configure and manage E-Commerce site content
- E. Describe & Demonstrate digital asset management
- F. Configure business-to-business (B2B) site
- G. Configure Ratings and review functionality
- H. Demonstrate E-Commerce Order Processing
- I. Lab: Create and manage an e-commerce site
- J. Lab: Configure an online store channel

IX. 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.

- A. Configure and work with Stock replenishment
- B. Configure and work with Order fulfillment
- C. Lab: Set up a rule for DOM & see it in action
- D. Lab: DOM Scenarios, Rules and examples

X. 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.

- A. Overview of Dynamics Fraud Protection
- B. Describe Dynamics Fraud Protection Services
- C. Configure and work with Dynamics Fraud Protection with Dynamics 365 Commerce
- D. Lab: Group discussion on a fraud protection case study
- E. Lab: Group discussion of options for identifying and preventing fraud