CREATE AND MANAGE SEGMENTS IN DYNAMICS 365 CUSTOMER INSIGHTS – DATA (MB-7006)

Course Code: 834083

In this course, you practice building segments using Customer Insights - Data. The skills validated include building a segment from profiles, generating insights and suggested segments, and managing segments. As prerequisites, students will ingest a dataset and build a simple customer profile.

Who Needs to Attend

This course is designed for Business Analyst and Functional Consultant roles.

Prerequisites

You should be familiar with the basic features of Dynamics 365 Customer Insights - Data and basic data modeling principles.

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CLASSROOM LIVE	$675 CAD	1 Day

Classroom Live Outline

Module 1: Ingest data into Customer Insights - Data

- Introduction
- Import data sources using Power Query
- Clean, transform, and load data
- Connect to an Azure Data Lake
- Connect to a Microsoft Dataverse
- Work with data sets
- Refresh data sources
- Check your knowledge
- Summary

Module 2: Create a unified customer profile in Dynamics 365 Customer Insights - Data

- Introduction
- Define source columns
- Define duplicate record settings
- Define matching rules
- Create a unified customer profile
- Check your knowledge
- Summary

Module 3: Work with Dynamics 365 Customer Insights - Data

- Introduction
- Configure searching and filtering indexes
- Define activities
- Work with measures
- Segmentation

- Get suggested segments
- Segment insights
- Use Customer Insights - Data for a complete solution
- Check your knowledge
- Summary

Module 4: Guided project - Create and manage segments with Dynamics 365 Customer Insights – Data

- Introduction
- Prepare for the guided project
- Exercise - Create unified customer profiles
- Exercise - Create measures
- Exercise - Create segments
- Exercise - Generate segment insights
- Knowledge check
- Summary

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| VIRTUAL CLASSROOM LIVE | $675 CAD | 1 Day |

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Jan 9 - 9, 2026 | 9:00 AM - 5:00 PM EST

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PRIVATE GROUP TRAINING	1 Day

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