



# 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 USD

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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Nov 24 - 24, 2025 | 9:00 AM - 5:00 PM EST

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

Apr 10 - 10, 2026 | 9:00 AM - 5:00 PM EDT



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PRIVATE GROUP TRAINING

1 Day

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