

MB-7006-A : Create and manage segments in Dynamics 365

Customer Insights – Data

Course Outline

Ingest data into Customer Insights – Data

Modules

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

Create a unified customer profile in Dynamics 365 Customer Insights – Data

Modules

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

Work with Dynamics 365 Customer Insights – Data

Modules

- Introduction
- Configure searching and filtering indexes
- Define activities
- Work with measures
- Segmentation
- Get suggested segments
- Segment insights
- Use Copilot in Dynamics 365 Customer Insights – Data
- Use Customer Insights – Data for a complete solution

- Check your knowledge
- Summary

**Guided project – Create and manage
segments with Dynamics 365 Customer
Insights – Data**

Modules

- Introduction
- Prepare for the guided project
- Exercise – Create unified customer profiles
- Exercise – Create measures
- Exercise – Create segments
- Exercise – Generate segment insights
- Module assessment
- Summary

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