MB-7006: Create and manage segments in Dynamics 365 Customer Insights – Data

Course ID #: 7000-1083-ZZ-Z

Hours: 7

Course Content

Description:

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.

Prerequisites:

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

Target Audience:

Data Analyst, Functional Consultant

Topics:

Lesson 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

Lesson 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

Lesson 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 Copilot in Dynamics 365 Customer Insights - Data
- Use Customer Insights - Data for a complete solution
- Check your knowledge
- Summary

Lesson 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
- Module assessment
- Summary

Register for this class by visiting us at:
www.tcworkshop.com or by calling us at 800-639-3535

NASBA Information

Attendance Requirement: To be awarded the full credit hours, you must sign in and attend the entire course.
Recommended Field(s) of Study:
Recommended CPEs: 7.80

Policies: Course Registration, Cancellation, Refund, and Complaint Resolution
For more information regarding administrative policies such as complaint and program cancellation policies, please contact our offices at 800-639-3535 or visit us at: **www.tcworkshop.com**

Official National Registry Statement:
The Computer Workshop is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credits. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org

NOTE: Since our information is in multiple places on our website or in PDF format that is sent to clients, we have provided our normal course content with the NASBA Information added along with links to our policy page on the web. We will add our name to the Official National Registry Statement after we are approved.