Purpose of this document
This study guide should help you understand what to expect on the exam and includes a summary of the topics the exam might cover and links to additional resources. The information and materials in this document should help you focus your studies as you prepare for the exam.

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<th>Useful links</th>
<th>Description</th>
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<tr>
<td>How to earn the certification</td>
<td>Some certifications only require one exam, while others require more. On the details page, you’ll find information about what skills are measured and links to registration. Each exam also has its own details page covering exam specifics.</td>
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<td>Certification renewal</td>
<td>Once you earn your certification, don’t let it expire. When you have an active certification that’s expiring within six months, you should renew it—at no cost—by passing a renewal assessment on Microsoft Learn. Remember to renew your certification annually if you want to retain it.</td>
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<td>Your Microsoft Learn profile</td>
<td>Connecting your certification profile to Learn brings all your learning activities together. You’ll be able to schedule and renew exams, share and print certificates, badges and transcripts, and review your learning statistics inside your Learn profile.</td>
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<td>Passing score</td>
<td>All technical exam scores are reported on a scale of 1 to 1,000. A passing score is 700 or greater. As this is a scaled score, it may not equal 70% of the points. A passing score is based on the knowledge and skills needed to demonstrate competence as well as the difficulty of the questions.</td>
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<td>Exam sandbox</td>
<td>Are you new to Microsoft certification exams? You can explore the exam environment by visiting our exam sandbox. We created the sandbox as an opportunity for you to experience an exam before you take it. In the sandbox, you can interact with different question types, such as build list, case studies, and others that you might encounter in the user interface when you take an</td>
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Useful links | Description
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 | exam. Additionally, it includes the introductory screens, instructions, and help topics related to the different types of questions that your exam might include. It also includes the non-disclosure agreement that you must accept before you can launch the exam.
Request accommodations | We’re committed to ensuring all learners are set up for success. If you use assistive devices, require extra time, or need modification to any part of the exam experience, you can request an accommodation.
Take a practice test | Taking a practice test is a great way to know whether you’re ready to take the exam or if you need to study a bit more. Subject-matter experts write the Microsoft Official Practice Tests, which are designed to assess all exam objectives.

Objective domain: skills the exam measures
The English language version of this exam was updated on October 19, 2022.

Some exams are localized into other languages, and those are updated approximately eight weeks after the English version is updated. Other available languages are listed in the Schedule Exam section of the Exam Details webpage. If the exam isn’t available in your preferred language, you can request an additional 30 minutes to complete the exam.

Note
The bullets that follow each of the skills measured are intended to illustrate how we are assessing that skill. Related topics may be covered in the exam.

Note
Most questions cover features that are general availability (GA). The exam may contain questions on Preview features if those features are commonly used.

Skills measured
- Design Customer Insights solutions (5-10%)
- Ingest data into Customer Insights (15-20%)
- Create customer profiles by unifying data (20-25%)
- Implement AI predictions in Customer Insights (5-10%)
- Configure measures and segments (15-20%)
- Configure third-party connections (15-20%)
Administer Customer Insights (5-10%)

Functional groups

Design Customer Insights solutions (5–10%)

Describe Customer Insights

- Describe Customer Insights components, including entities, relationships, activities, measures, and segments
- Analyze Customer Insights data by using Azure Synapse Analytics
- Describe support for near real-time updates
- Describe support for enrichment

Describe use cases for Customer Insights

- Describe use cases for Customer Insights
- Describe use cases for creating reports by using Customer Insights
- Describe use cases for extending Customer Insights by using Microsoft Power Platform components
- Describe use cases for Customer Insights APIs

Ingest data into Customer Insights (15–20%)

Connect to data sources

- Determine which data sources to use
- Determine whether to use the managed data lake or an organization's data lake
- Connect to Microsoft Dataverse
- Connect to common Data Model folders
- Connect to data sources by using Power Query connectors
- Ingest data from Azure Synapse Analytics
- Ingest data by using Azure Data Factory pipelines
- Describe real-time ingestion capabilities and limitations
- Describe benefits of pre-unification data enrichment
- Ingest Data in real-time
- Update Unified Customer Profile fields in real-time

Transform, cleanse, and load data by using Power Query

- Select tables and columns
- Resolve data inconsistencies, unexpected or null values, and data quality issues
- Evaluate and transform column data types
- Apply data shape transformations to tables
Configure incremental refreshes for data sources
- Identify data sources that support incremental updates
- Configure incremental refresh
- Identify capabilities and limitations for scheduled refreshes
- Configure scheduled refreshes and on-demand refreshes
- Trigger refreshes by using Power Automate or the Customer Insights API

Create customer profiles by unifying data (20–25%)

Implement mapping
- Select Customer Insights entities and attributes for unification
- Select attribute types
- Select the primary key

Implement matching
- Specify a match order for entities
- Define match rules
- Define exceptions
- Include enriched entities in matching
- Configure normalization options
- Differentiate between low, medium, high, exact, and custom precision methods
- Deduplicate enriched entities
- Define deduplication rules
- Review deduplication results
- Run a match process and review results
- Review match results

Implement merges
- Specify the order of fields for merged tables
- Combine fields into a merged field
- Combine a group of fields
- Separate fields from a merged field
- Exclude fields from a merge
- Change the order of fields
- Rename fields
- Configure customer ID generation
- Run a merge and review data unification results
- Group profiles into Clusters
Configure search and filter indexes
- Define which fields should be searchable
- Define filter options for fields
- Define indexes

Configure relationships and activities
- Create and manage relationships
- Create activities by using a new or existing relationship
- Create activities in real-time
- Manage activities

Implement AI predictions in Customer Insights (5–10%)

Configure prediction models
- Configure and evaluate the customer churn models, including the transactional churn and subscription churn models
- Configure and evaluate the product recommendation model
- Configure and evaluate the customer lifetime value model
- Create a customer segment based on prediction model
- Configure and manage sentiment analysis

Implement machine learning models
- Describe prerequisites for using custom Azure Machine Learning models in Customer Insights
- Implement workflows that consume machine learning models
- Manage workflows for custom machine learning models

Configure measures and segments (15–20%)

Create and manage measures
- Create and manage tags
- Describe the different types of measures
- Create a measure
- Create a measure by using a template
- Configure measure calculations
- Modify dimensions

Create and manage segments
- Create and manage tags
- Describe methods for creating segments, including segment builder and quick segments
- Create a segment from customer profiles, measures, or AI predictions
- Create a segment based on a prediction model
• Find similar customers
• Project attributes
• Track usage of segments
• Export segments

Find suggested segments
• Describe how the system suggests segments for use
• Create a segment from a suggestion
• Create a suggested segment based on activity
• Configure refreshes for suggestions

Create segment insights
• Configure overlap segments
• Configure differentiated segments
• Analyze insights
• Find similar segments with AI

Configure third-party connections (15–20%)

Configure connections and exports
• Configure a connection for exporting data
• Create a data export
• Define types of exports
• Configure on demand and scheduled data exports
• Define the limitations of segment exports

Export data to Dynamics 365 Marketing or Dynamics 365 Sales
• Identify prerequisites for exporting data from Customer Insights
• Create connections between Customer Insights and Dynamics 365 apps
• Define which segments to export
• Export a Customer Insights segment into Dynamics 365 Marketing as a marketing segment
• Use Customer Insights profiles and segments with real-time marketing
• Export a Customer Insights profile into Dynamics 365 Marketing for customer journey orchestration
• Export a Customer Insights segment into Dynamics 365 Sales as a marketing list

Display Customer Insights data from within Dynamics 365 apps
• Identify Customer Insights data that can be displayed within Dynamics 365 apps
• Configure the Customer Card add-in for Dynamics 365 apps
• Identify permissions required to implement the Customer Card Add-in for Dynamics 365 apps
Implement Data Enrichment
- Enrich customer profiles
- Configure and manage enrichments
- Enrich data sources before unification
- View enrichment results

Use Customer Consent data
- Add Consent Data to Customer Insights
- Use Consent Data

Administer Customer Insights (5–10%)

Create and configure environments
- Identify who can create environments
- Differentiate between trial and production environments
- Connect Customer Insights to Microsoft Dataverse
- Connect Customer Insights with Azure Data Lake Storage Account
- Manage existing environments
- Change or claim ownership of the environment
- Reset an existing environment
- Configure user permissions
- Describe available user permissions

Manage system refreshes
- Differentiate between system refreshes and data source refreshes
- Describe refresh policies
- Configure a system refresh schedule
- Monitor and troubleshoot refreshes

Create and manage connections
- Describe when connections are used
- Configure and manage connections

Study Resources
We recommend that you train and get hands-on experience before you take the exam. We offer self-study options and classroom training as well as links to documentation, community sites, and videos.
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