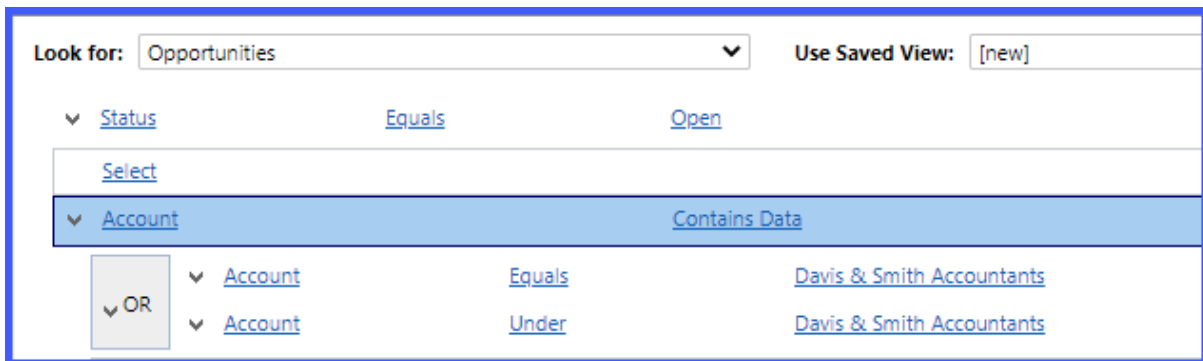


Advanced Find is a very powerful reporting tool within Dynamics 365.

Often records, particularly Accounts, Users or Opportunities are configured with a “parent” record relationship.

Advanced Find allows you report on this hierarch using the operators “**Under**” and “**Not Under**”.

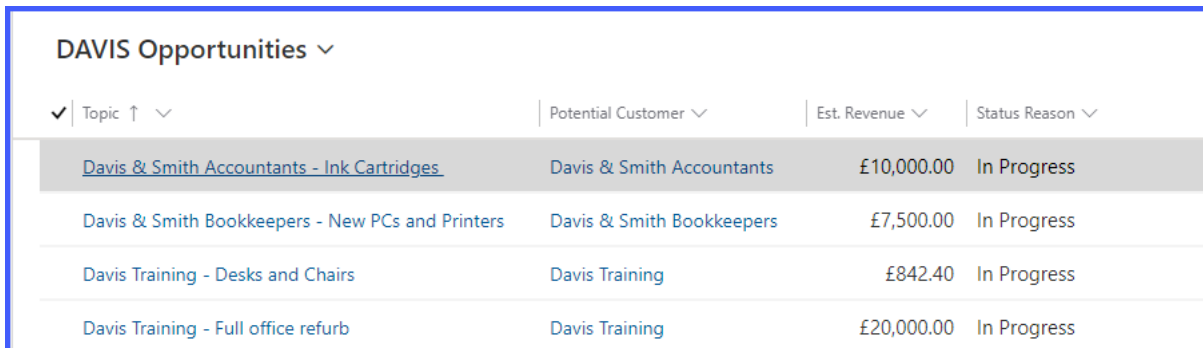
For example, to have a view of all Open Opportunities linked to Accounts that are related to a specific Account or any Accounts under it.



The screenshot shows the Advanced Find configuration interface. At the top, 'Look for:' is set to 'Opportunities' and 'Use Saved View:' is set to '[new]'. Below this, there are several filter criteria:

- Status**: Equals Open
- Account**: Contains Data
- OR** (operator)
- Account**: Equals Davis & Smith Accountants
- Account**: Under Davis & Smith Accountants

The View can then be sorted and have columns added as required.



The screenshot shows the resulting 'DAVIS Opportunities' view. The view title is 'DAVIS Opportunities'. The columns are: Topic, Potential Customer, Est. Revenue, and Status Reason. The data is as follows:

Topic	Potential Customer	Est. Revenue	Status Reason
Davis & Smith Accountants - Ink Cartridges	Davis & Smith Accountants	£10,000.00	In Progress
Davis & Smith Bookkeepers - New PCs and Printers	Davis & Smith Bookkeepers	£7,500.00	In Progress
Davis Training - Desks and Chairs	Davis Training	£842.40	In Progress
Davis Training - Full office refurb	Davis Training	£20,000.00	In Progress