

Advanced Find is a very powerful reporting tool within Dynamics 365. This is the first of three Tech Tips looking at some of the more advanced features of Advanced Find.

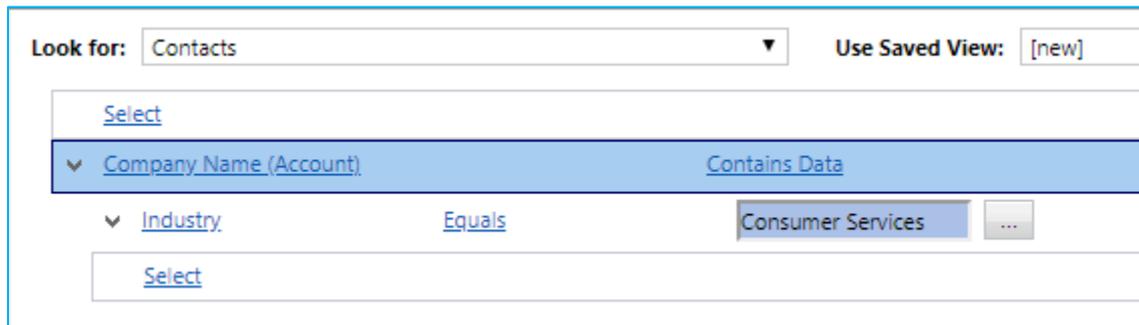
Related entities allow you to access information from other record types (entities) to further refine the record selection. Typical examples are Contacts related to Accounts, or Cases related to Contacts. Most often (but not always) these are on a many-to-one relationship.

[Example 1: Contacts related to Accounts with a specific Industry type.](#)

The Advanced Find starts from Contacts:

Then select the related entity Company Name (Account) using Contains Data to only include contacts that are related to an Account.

Then use the selection criteria to select just the Industry required. This could be any/multiple criteria depending on your requirements.



The screenshot shows the Advanced Find interface. At the top, 'Look for:' is set to 'Contacts' and 'Use Saved View:' is '[new]'. Below this, there are two 'Select' buttons. The first selection is 'Company Name (Account)' with the relationship type 'Contains Data'. The second selection is 'Industry' with the relationship type 'Equals' and the value 'Consumer Services'.

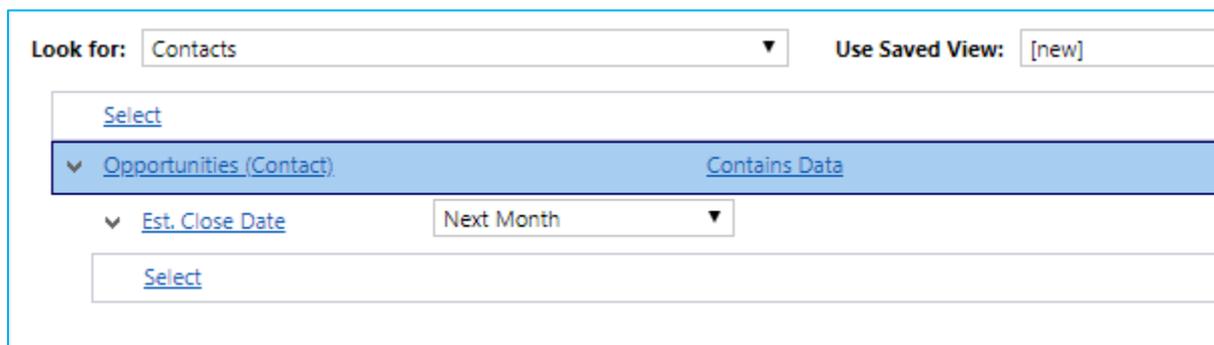
[Example 2: Contacts who have an Opportunity due to close Next Month.](#)

Again, you usually start from the “lowest” level:

Contacts

Related to Opportunities (Contacts) that contain data

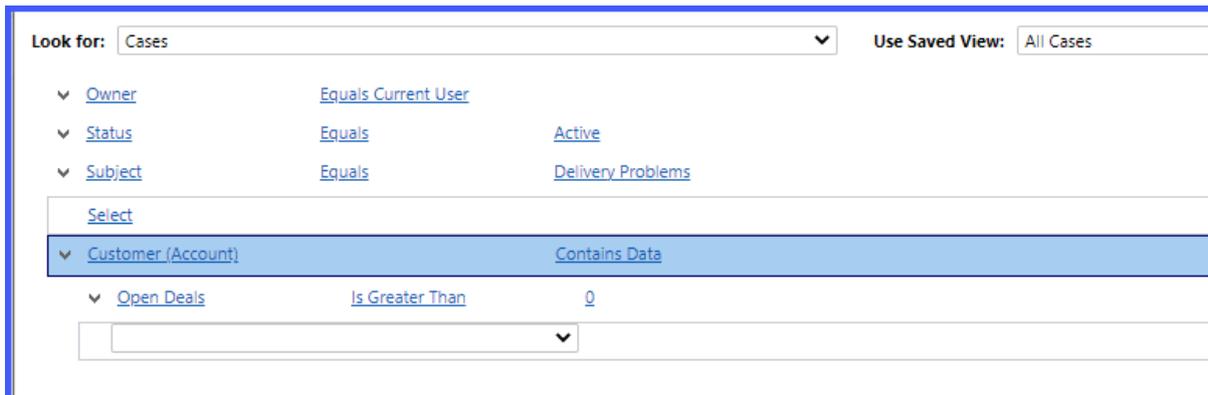
Then selection criteria – Est. Close Date is Next Month.



The screenshot shows the Advanced Find interface. At the top, 'Look for:' is set to 'Contacts' and 'Use Saved View:' is '[new]'. Below this, there are two 'Select' buttons. The first selection is 'Opportunities (Contact)' with the relationship type 'Contains Data'. The second selection is 'Est. Close Date' with the relationship type 'Next Month'.

Example 3: Active Cases about Delivery Problems that are owned by the logged in user, and are related to Accounts with at least one open opportunity.

Start from cases and add in the selection criteria for Cases, then add the relationship to Accounts and the criteria for Accounts.

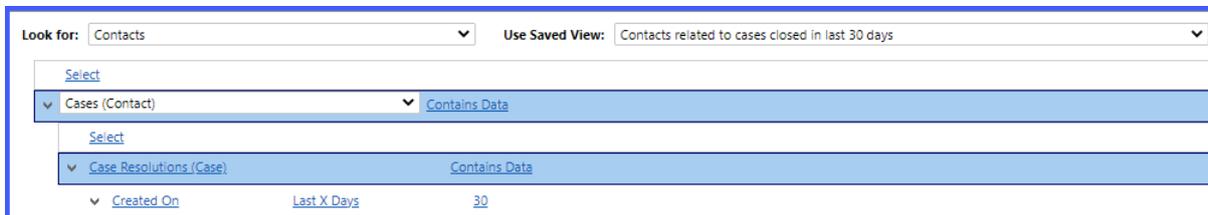


The screenshot shows the Advanced Find interface for 'Cases'. The 'Look for:' dropdown is set to 'Cases' and 'Use Saved View:' is set to 'All Cases'. The criteria list includes:

- Owner: Equals Current User
- Status: Equals Active
- Subject: Equals Delivery Problems
- Customer (Account): Contains Data
- Open Deals: Is Greater Than 0

Example 4: Contacts related to Cases closed in the last 30 days

Of course, further refinements could be added to this to define the type of resolution, or some specific property relating to the Case.



The screenshot shows the Advanced Find interface for 'Contacts'. The 'Look for:' dropdown is set to 'Contacts' and 'Use Saved View:' is set to 'Contacts related to cases closed in last 30 days'. The criteria list includes:

- Cases (Contact): Contains Data
- Case Resolutions (Case): Contains Data
- Created On: Last X Days 30

Hopefully you have found these examples useful as a starting point to try using Advanced Find further.

Don't forget – CRM365 Solutions provide Training and Consultancy in Advanced Find as well as a wide range of other Dynamics 365 services. Call 01803 501365 for further information.