

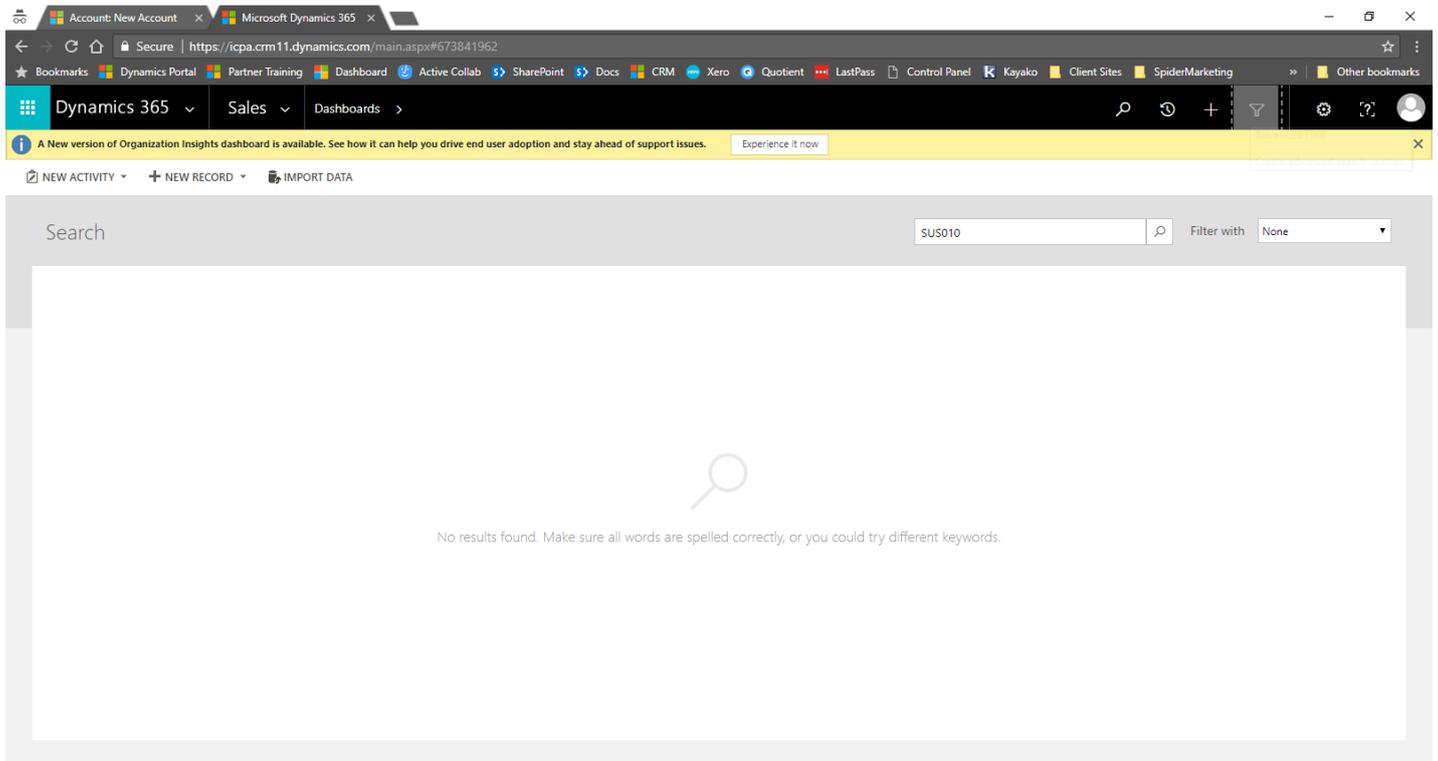
## USING ADVANCED FIND USER GUIDE

### Overview

This user guide provides the basic steps for using Advanced Find to locate specific records or lists of records e.g. Accounts with a specific Membership Number or Sequence Number.

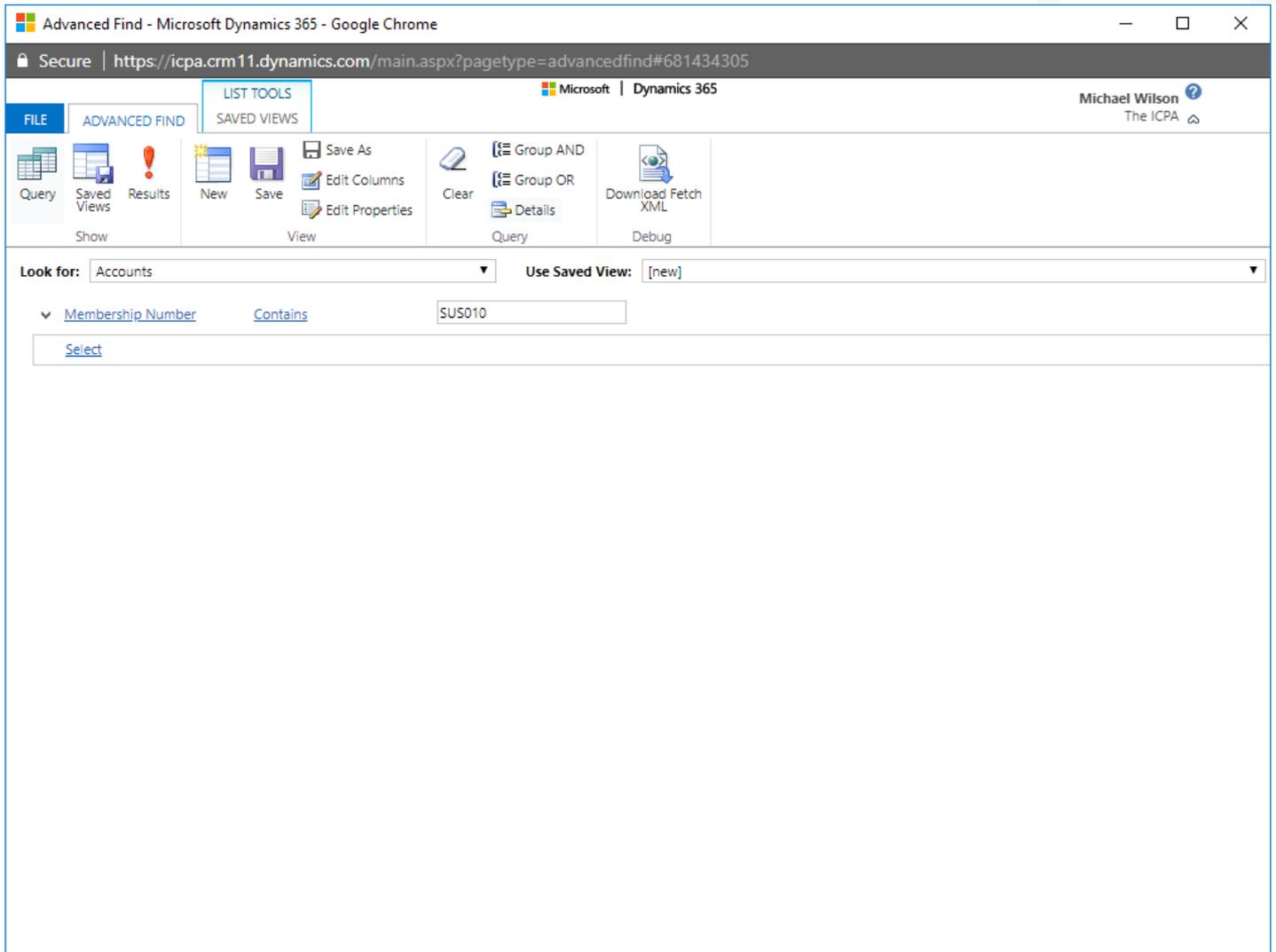
### Step 1

Click on the **[Advanced Find]** Icon



## Step 2

- Set “Look for:” as **[Accounts]**
- Click on **[Select]**
- Choose the field you want to search, *e.g. Membership Number*
- Click on **[Equals]** and select the desired option *e.g. [Contains]*
- Click on **[Enter Text]** and enter the required Membership Number *e.g. SUS010*



The screenshot shows the Microsoft Dynamics 365 Advanced Find interface in a Google Chrome browser window. The browser title is "Advanced Find - Microsoft Dynamics 365 - Google Chrome" and the address bar shows the URL "https://icpa.crm11.dynamics.com/main.aspx?pagetype=advancedfind#681434305". The user is identified as "Michael Wilson" from "The ICPA". The interface includes a ribbon with "FILE", "ADVANCED FIND", and "LIST TOOLS" tabs. The "ADVANCED FIND" ribbon contains several groups of icons: "Query" (Query, Saved Views, Results), "New" (New, Save, Save As, Edit Columns, Edit Properties), "Clear" (Clear), "Group" (Group AND, Group OR, Details), and "Download Fetch XML" (Download Fetch XML, Debug). Below the ribbon, the "Look for:" dropdown is set to "Accounts" and the "Use Saved View:" dropdown is set to "[new]". The search criteria are "Membership Number" (expanded), "Contains", and "SUS010". A "Select" button is visible below the search criteria.

## Step 3

Click on the **[Results]** Icon



## Step 4

Click on the name of the relevant record to open the required record

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The interface features a top navigation bar with "FILE", "ADVANCED FIND", and "ACCOUNTS" tabs. Below this is a ribbon with various action buttons grouped into "Records", "Collaborate", "Process", and "Data".

The main content area displays a table with the following columns: "Account Name", "Primary Contact", and "Main Phone". A single record is visible:

Account Name	Primary Contact	Main Phone
Sussex Business Consulting Ltd	Katarzyna Okroj	02081333480

At the bottom of the table, there is a status bar indicating "1 - 1 of 1 (0 selected)" and "Page 1".