

Cornerstone Reports for Profit Solver

The two reports that we need from Cornerstone is for Doctors Production and Services performed.

Doctors Production Report

1. In Cornerstone, go to **Reports>End of Period>End of Month**.
2. Scroll down to select "Productivity by Staff." select the 12 month range for the report,
3. Click preview.
4. Click print to print the report
 - a. there will be an area to select a printer. Change the printer to "Cornerstone PDF" and then a box will pop up to "Save" the document. Name the document "Doctor Production" and save to your desktop or an easily identifiable location.
5. Once saved, email and attach PDF.

This report may have changed over time. You can call Cornerstone to get the correct name for this report. It may be the Monthly Staff Commission Summary Report - Net from Report list.

Services Report (see example on next page)

Report Title: *Inventory Sales Report by Revenue Center - by Class by Desc*

Report Description Sort Order and Range

The Inventory Sales Report by Revenue Center – by Class by Description displays both the percent and dollar amounts of revenue for each inventory subclass by revenue center. Use this report for a quick summary of the items with the highest sales in the selected monthly periods and to track seasonal and promotional items easily.

Directions to Run the Report

1. In Cornerstone, select **Reports > End Of Period > End Of Year (or Month)**.
2. Select the desired End of Year (Month) Date from the Yearly (Monthly) periods area.
3. Select Inventory Sales Report by Revenue Center - by Class by Desc from Report list..
4. Once you highlight and select the 12 month range for the report, then
5. Click **Preview**.
6. Click **Print to print the report**, Save to save the report to a specific location or Cancel to close the report preview window.
7. NOTE: when you click save, there will be a drop down bar that originally saves as a TXT file, click there to change it to a Comma Separated File (CSV) if possible and email mail it back to us. (A PDF will work here as well and should be one of the options when printing)

Report Title: Inventory Sales Report by Revenue Center - by Class by Desc

Report Description

The Inventory Sales Report by Revenue Center – by Class by Description displays both the percent and dollar amounts of revenue for each inventory subclass by revenue center. Use this report for a quick summary of the items with the highest sales in the selected monthly periods and to track seasonal and promotional items easily.

Sort Order and Range

Sort Order	Range
<ul style="list-style-type: none"> There are no <i>Sort Order</i> options for this report. 	<ul style="list-style-type: none"> Class ID Invoice Item Description Invoice Item ID Revenue Center ID Subclass

Report Fields

- Item ID:** The unique item ID assigned to each invoice item ID.
- Item Description:** The description assigned to each invoice item.
- Quantity:** The total quantity of the inventory item invoiced during the specific period/s selected
- Sales Revenue:** The price on the Invoice (discounts or taxes are not included)
- Percentage of Sales:** The percentage (%) of total sales during the specific period selected. The total of all subclassifications will = 100%



Additional Information
Also included but without headings:

- Subclass Total
- Revenue Center Total
- Grand Total

Directions to Run the Report

- In Cornerstone, select **Reports > End Of Period > End Of Month**.
- Select the desired **End of Month Date** from the *Monthly periods* area.
- Select *Inventory Sales Report by Revenue Center - by Class by Desc* from *Report list*.
- Click **Preview**.
- Click **Print** to print the report, **Save** to save the report to a specific location or **Cancel** to close the report preview window.

[Click here to see a full copy of this report](#)

tip [Click here view the steps to select multiple monthly periods for this report.](#)

Applies To

This report applies to all Cornerstone[®] versions starting with Cornerstone[®] 4.0.

Item ID and Description	Quantity	Sales Revenue	Percentage of Sales
Revenue Center -- H Hospital			
Inventory Sales -- NSA Heartworm			
Inventory Subclass --			
07403 Interceptor 23 mg	4.00	\$152.00	26.96%
Subclass Total:		4.00	\$152.00 26.96%
Inventory Sales -- NTR Nutritional			
Inventory Subclass -- FON Foods - Nutritional Supplement			
04022 Derm Cape ES Liquid 80 ml	4.00	\$56.00	9.93%
Subclass Total:		4.00	\$56.00 9.93%
Inventory Sales -- NTR Nutritional			
Inventory Subclass -- FOP Foods - Prescription Diet			
05806 Adult Canine Dry 40 lbs	1.00	\$37.65	6.68%
05828 Adult Canine Dry 35 lbs	2.00	\$73.68	13.07%
04013 Adult Canine Dry 5 lbs	1.00	\$10.28	1.82%
Subclass Total:		4.00	\$121.61 21.57%
Inventory Sales -- NTR Nutritional			
Inventory Subclass -- FOS Foods - Science Diet			
06668 Maint Canine 15.5 oz Breef	24.00	\$48.00	8.51%
06766 Maint Canine Dry 5 lbs	1.00	\$6.50	1.15%
06734 Maint Canine Dry 40 lbs	3.00	\$107.75	19.12%
Subclass Total:		28.00	\$162.25 28.78%
Inventory Sales -- PHA Pharmaceuticals			

Cornerstone Support Reference Document: **KB433**

Selecting Multiple Periods on the End of Period windows

1. On the *Daily Reports*, *Monthly Reports* or *Yearly Reports* windows, in the *Periods* area, select the first period.

Note: When selecting your first period of a multiple period report, keep in mind the report will contain data from the moment in time since the last period closing. (i.e. end of day closed on Fri 7/3/09 and next closed daily period is 7/6/09, and you select 7/6/09 as your first period, the report will contain transactions entered on 7/4 and 7/5, if there were any.)

2. Hold the **Shift** key on your keyboard down.

3. Select the ending *Period*.

Note: You must select consecutive daily periods.

4. This will highlight all ranges between beginning and ending period.

Note: This will also add all totals together.

5. Verify the correct reports are selected and click **Preview** or **Print**.

Note: You cannot **Preview** multiple reports as the Preview button is grayed.

Printing a Report

This output option prints the report directly to a printer, without the option to preview it first. The *Print Options* window displays once you have selected your desired sort order and range. Here you can set the number of copies, specify a page range, and choose an alternate printer if you do not want this report to print to the default printer.

Changing the Printer Selection:

1. Click the **Printer...** button.
2. The *Printer Selection* window displays the printers available from this computer. Select the desired printer from the list and click **OK**.

Note: Printer selection options will vary.

Saving a Report as a Cornerstone PDF

The **Cornerstone PDF** printer option converts a report to a .pdf file (portable document format). Use of the Cornerstone PDF feature allows you to save a report as a file and retain its format, so the document can be used with other software and as an e-mail attachment.

To Save a Report as a Cornerstone PDF:

1. On the *Reports* list select the desired report.
2. Click **Print**.
3. Complete the Sort Order and Range.

4. Click **OK**.
5. The *Print Options* window displays. Click the **Printer...** button.
6. Select **Cornerstone PDF** and click **OK**.
7. The *Save As...* window displays.
8. Click the drop-arrow in the *Save in* field to select the location for the saved report, or leave the default location set to Desktop. You will need to remember this location when you want to retrieve the file later for merging or importing into another software program.
9. Press **Tab** twice to move the *File name* field and enter a name for the report.
10. Click **Save**.

Saving a Report as a Text File

The Save As print option allows you to specify a file name and location to which to save the report as a text file. This option does not allow you to preview the report and does not retain the format that you see in the preview screen. The resulting text file is in comma-delimited format, which is useful for exporting information to be used in other software products (e.g. Microsoft® Word, Microsoft® Excel, QuickBooks®, etc).

To save a report as a text file:

1. On the *Reports* list select the desired report.
2. Click **Save As**.
3. Complete the Sort Order and Range.
4. Click **OK**. The *Save As...* window displays.
5. Click the drop-arrow in the *Save in* field to select the location for the saved report, or leave the default location set to Desktop. You will need to remember this location when you want to retrieve the file later for merging or importing into another software program.

Note: For creating and saving a file that will be used for generating labels using Microsoft Word, save the file as “labels.txt” in the Cstone folder. This is the default location the Cornerstone label templates look to when attempting to locate the necessary text file.

6. Press **Tab** twice to move to the *File name* field and enter a name for the report.
7. Click **Save**.

Questions

If you have any questions about this reporting tool, please call IDEXX Cornerstone Support at 1-800-695-2877, option #1.

Sample Sales Service Report

Inventory Sales Report by Revenue Center

Monthly - By Class By Item Desc.

Thursday, June 29, 2000 06:26 pm through Tuesday, March 04, 2003 01:26 am

Item ID and Description	Quantity	Sales Revenue	Percentage of Sales
Revenue Center -- H Hospital			
Inventory Sales -- HEA Heartworm			
Inventory Subclass --			
07403	Interceptor 23 mg	4.00	\$152.00 26.96%
		Subclass Total:	4.00 \$152.00 26.96%
Inventory Sales -- NTR Nutritional			
Inventory Subclass -- FON Foods - Nutritional Supplement			
04022	Derm Caps ES Liquid 60 ml	4.00	\$56.00 9.93%
		Subclass Total:	4.00 \$56.00 9.93%
Inventory Sales -- NTR Nutritional			
Inventory Subclass -- FOP Foods - Prescription Diet			
05806	k/d Canine Dry 40 lbs	1.00	\$37.65 6.68%
05828	r/d Canine Dry 35 lbs	2.00	\$73.68 13.07%
04013	t/d Canine Dry 5 lbs	1.00	\$10.28 1.82%
		Subclass Total:	4.00 \$121.61 21.57%
Inventory Sales -- NTR Nutritional			
Inventory Subclass -- FOS Foods - Science Diet			
06668	Maint Canine 15.5 oz Beef	24.00	\$48.00 8.51%
06766	Maint Canine Dry 5 lbs	1.00	\$6.50 1.15%
06734	Maint Canine Dry 40 lbs	3.00	\$107.76 19.12%
		Subclass Total:	28.00 \$162.26 28.78%
Inventory Sales -- PHA Pharmaceuticals			

Service Sales Report

Yearly - By Class By Item Desc.

Thursday, December 31, 2020 05:00 pm through Friday, December 31, 2021 07:42 pm

Item ID and Description	Quantity	Sales Revenue	Percentage of Sales
Service Class -- BD Boarding			
Service Subclass --			
550	Cat Boarding	41.50	\$973.13 0.20%
554	Day Board	13.00	\$204.75 0.04%
555	Dog Boarding <40#	68.00	\$1,374.00 0.28%
556	Dog Boarding >40#	45.00	\$1,598.00 0.32%
		Subclass Total:	167.50 \$4,149.88 0.84%
Service Class -- DE Dental			
Service Subclass --			
610	Cat Dentistry	15.00	\$1,504.86 0.30%
614	Cat Fluoride Treatment	12.00	\$270.72 0.05%
611	Dog Dentistry	86.00	\$9,244.97 1.87%
613	Dog Fluoride Treatment	51.00	\$1,150.56 0.23%
612	Tooth extraction, per root (\$20-\$40/root)	105.00	\$2,739.28 0.55%
		Subclass Total:	269.00 \$14,910.39 3.01%
Service Class -- DG Diagnostics			
Service Subclass --			
8907	ANAL GLAND INFECTION	1.00	\$35.00 0.01%
8004	BROKEN TOE NAIL	1.00	\$35.00 0.01%
9911	RABIES	1.00	\$5.00 0.00%
		Subclass Total:	3.00 \$75.00 0.02%
Service Class -- FL Fluid Therapy			
Service Subclass --			
3301	Fluid Therapy Subcutaneous 100mL+	10.00	\$355.00 0.07%
330	Fluid Therapy-Subcutaneous <100mL	6.00	\$166.38 0.03%
332	IV Catheter	47.00	\$1,946.48 0.39%
3320	IV Catheter & Fluids	162.00	\$8,190.72 1.65%
		Subclass Total:	225.00 \$10,658.58 2.15%