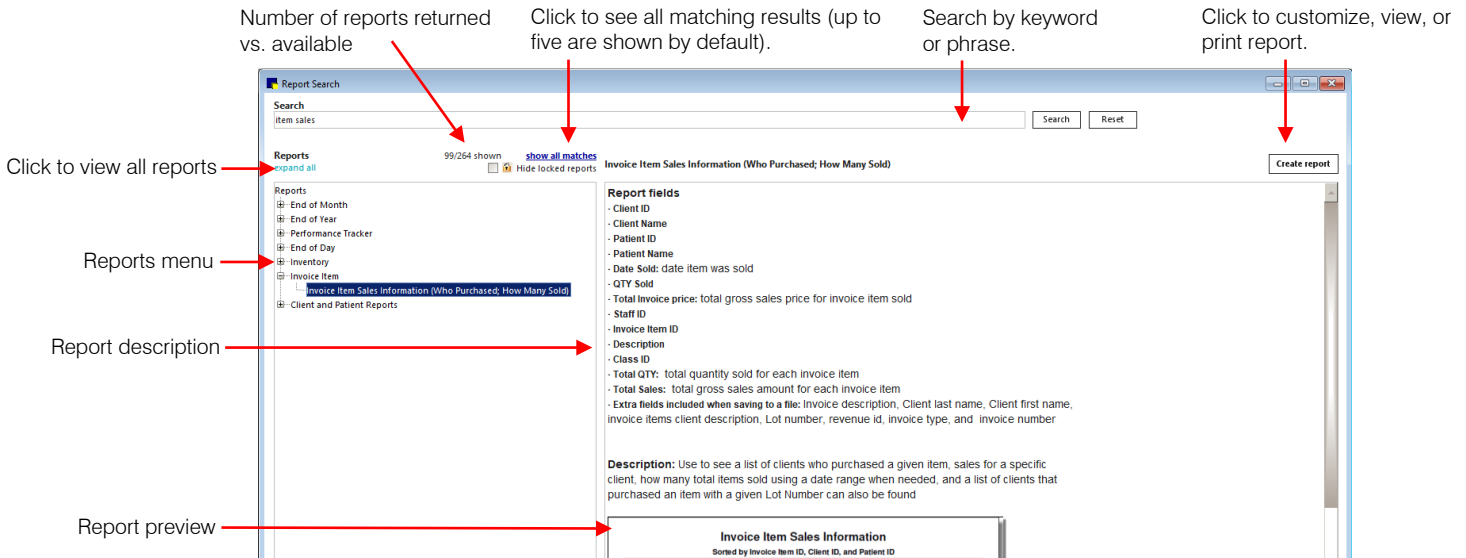


Cornerstone Reports

Use Cornerstone* Software reports to analyze your practice and help you determine how to increase your profitability. You can search for a report and then use filters to get only the information you need. Then you can print the report or save the report in several file types, such as .csv or .xls (for use in spreadsheets), .txt, and more.



Find a report

1. On the **Reports** menu, select **Find a Report** to open the Report Search window.
2. To browse to a report, click a plus sign [+] to open a report group and display the reports within it.

OR

To search for a report, in the **Search** box, type a keyword or phrase and click **Search**.

Note: Common variations or abbreviations in Cornerstone are automatically included. For example, a search on “dog” includes “canine,” and a search on “PVL” includes “Patient Visit List.”

To refine your search, use the following options:

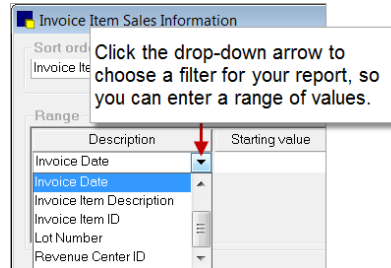
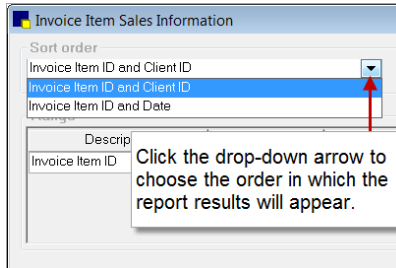
Option	Example
Use quotation marks to search for an exact phrase.	“price change reason” Gives more specific and targeted results than typing price change reason without quotation marks.
Use “and” between search terms to require both terms. Use “or” between search terms to search for either term. Use parentheses to group terms.	“sales tax” and (daily monthly) Finds reports that include sales tax information, specifically daily or monthly reports.
Type a minus sign [-] before a word to exclude it from the search or type a plus sign [+] to include it.	-month + “deposit report” Excludes monthly reports from your search of deposit reports.

The top five report matches are marked within their expanded report groups. Click a report in the list to view the report details and a sample report.

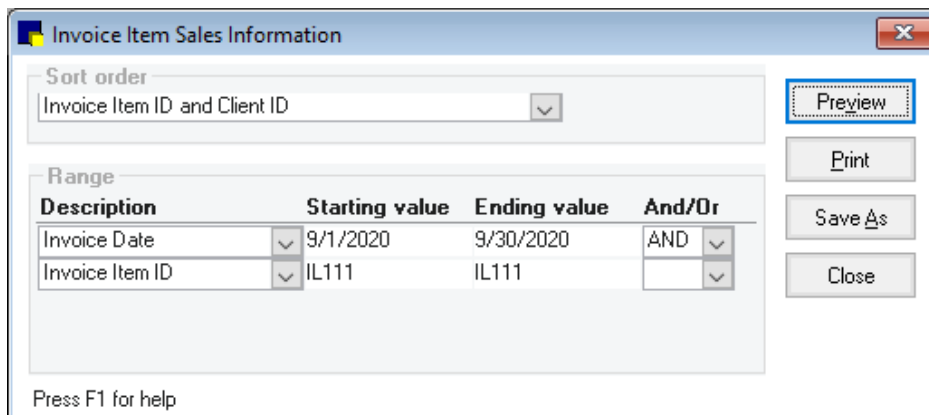
Tip: Click **+ enlarge sample** at the bottom of the sample to open the sample report in a preview window.

Create a report

1. To create a report, select it in the **Reports** list and click **Create report**, or double-click the report.
A window that lets you set filters and sorting options opens.
Note: Depending on the type of report you are creating, different sorting options and ranges are available.
2. From the **Sort order** drop-down list, select the information to sort by.
3. In the Range area, from the **Description** column drop-down list, select a filter option.



4. Enter values in the **Starting value** and **Ending value** fields.
Note: Your starting and ending values will usually be the same unless the items you select are sequential. Leave the starting and ending values blank to return **all** possible results.
5. To add another range, such as date range and invoice item, from the **And/Or** column drop-down list, select **AND** (to include criteria from *both* ranges) or **OR** (to include information that meets criteria from *either* range).



This report prints a list of the sales for item ID IL111 for the month of September in Client ID order.

6. Click **Preview** to see the report before printing or saving.
7. Click **Print** to print the report without previewing it; click **Save As** to save the report as a text document, spreadsheet, or other file type.

Keyboard shortcuts

F1	Display on-screen help for the current window.
F2	Look up values for a list, such as in ID fields.
F7, F8	Display recently accessed clients/patients.
SHIFT + Tab	Move the cursor to the previous field.
Ctrl + D	Delete the selected record.
Ctrl + U	Update the selected record.
Ctrl + C/Ctrl + V	Copy and paste the selected item.
Ctrl + Enter	Move cursor to the next line in note areas.

For more information

- For report setup and detailed instructions, see the **Printing Reports** section in the Cornerstone Help (F1).
- Go to idexlearningcenter.com to view snippet videos about many Cornerstone features and access the [reporting learning journey](#).

Find this guide

Look under “Resources by Topic” on the cornerstonehelp.com page.