Working with a Cornerstone Multi-Location/Single Database System

If your Cornerstone* Software and database are shared by multiple practice locations, follow the steps below to:

- Add practice(s) and designate one as the primary practice.
- Assign a default practice to staff or to a workstation.
- Assign clients to a home practice.
- Create cashier IDs and revenue centers per practice

You’ll find a list of Multi-Location/Single Database reports at the end of this document.

Adding a practice and designating it as the primary practice

Designate one practice as the primary practice. This practice cannot be flagged as inactive. If using Pet Health Network* Pro for client communications, the primary practice name and contact information will be listed on all client communications.

1. Go to Lists > Practice, and then click New or Update.
2. To designate this practice as the primary, select the Primary check box.
3. Enter or update the practice information.
   **Tip:** Next to the Practice Color box, click the three dots (…) to choose a practice color. The practice and staff member names will appear in that color in the lower right corner of the screen.
4. Click OK.

Assigning a default practice

A default practice can be assigned either to a workstation or to a staff ID. Cornerstone first looks for a default practice for the logged-in user; if none exists, it uses the workstation default. If both are absent, the primary practice is used.

To assign a default practice to a workstation:

1. Go to Controls > Defaults > Practice and Workstation.
2. On the left, select Workstation > Workstation-All.
3. In the Default Practice list, select the default practice for this workstation and click OK.
   When a staff member logs on, they will use the default practice’s information.

   **Tip:** To log on to a different practice, a staff member with appropriate security privileges can select File > Switch Logged In Practice.

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To assign a default practice to a staff ID:
1. Go to Controls > Defaults > Staff.
2. Select the Miscellaneous tab.
3. Select the default practice for this staff ID.
4. Click Save to add this practice as a default for another Staff ID, or click OK to save changes and close.

Assigning clients to a home practice

Each client must be assigned to a home practice. When you generate an Accounts Receivable report, you’ll find the client’s name on the accounts receivable list for the home practice only; however, the client’s balance will be the total outstanding balance from all practices.

You can assign multiple clients to a home practice at one time.
1. Go to Tools > Assign Clients to Practice.
2. Enter search criteria to find the group of clients (for example, enter a range of postal codes), and then click Search. A list of clients is displayed.
3. To the right of the Client List, click Select All or select the check boxes for each individual client you want to include.
4. In the Assign selected clients to drop-down list, select the new home practice for the clients, and then click Assign.
5. Click Close.

Creating or updating cashier IDs

If a staff member works at more than one location, create a separate cashier ID for that person at each location.
1. Go to Lists > Cashier ID, and then click New or Update.
2. When prompted, enter an administrator user name and password.
3. Enter the cashier information, including a cashier ID, user name, and password, and then click OK.
4. In the New Cashier ID window, enter or modify the Cashier ID, Cashier name, Password, Confirm password, and other information.
5. Click OK to add this cashier ID to the list. Repeat as needed for each tax and practice.

Tips:
• Each cashier ID must have a unique password.
• If a staff member works at multiple practices, create a cashier ID for each location using a consistent naming convention. Use the practice ID as the prefix, followed by the initials, e.g., 1RT, 2RT, 3RT. This will improve the display of cashier IDs or ID ranges on reports.

Sales tax by practice

If your practice locations use different sales tax rates, the sales tax can be applied based on the logged-in practice.
1. Go to Controls > Taxes, and then click New or Update.
2. Enter or modify the description, percentage, GL account, and practice information accordingly.
3. Click OK. Repeat as needed for each tax and practice.
4. To apply taxes to each invoice item, go to the Lists > Invoice item > Tax/Disc tab; to apply taxes to all items, go to Tools > Mass Markup (exclusive use required).

For more details, refer to F1 or Reconfiguring Taxable Items.
Creating or updating revenue centers

It’s best to associate each practice with a different revenue center. When you run reports by practice, the assigned revenue center will be used automatically to print the applicable amounts (e.g., Serv. and Inv Sales-Closed Inv - by Revenue Center). Assigning revenue centers to practices allows you to separate these items by practice: sales, taxes (including different tax rates), and discounts. (Note: Line item discount amounts are reported by revenue center on the end of period summary reports only.)

1. Go to Lists > Revenue Centers, and then click New or Update.

2. Enter a revenue center description and ID. Each ID must be unique among all the practices sharing the database.

3. Select the practice name to associate with this revenue center and then click OK.

Determining revenue centers

A revenue center is required for each item for an invoice, patient visit list, estimate, prescription label, diagnostic request, or appointment item. Based on your practice’s MLSD configuration and practice type, Revenue Centers can be assigned at the item, classification, or staff level.

Multi-Location/Single Database reports

Reports that display data by practice, typically client information, accounts receivable or payments:

- Daily Payment Register – By Practice
- New Client Report – By Practice
- Daily Summary Report – By Practice†
- Monthly Sales Summary - By Practice†
- Yearly Sales Summary - By Practice†
- Accounts Receivable Report - By Practice
- Monthly Invoices and Statement
- Client/Patient Report Builder
- Census
- Client Account History

Reports that display data by revenue center, typically sales information:

- Itemized Audit Trail for Revenue Center
- Serv. And Inv. Sales by Revenue Center
- YTD Net Sales by Center
- Sales Tax Summary by Revenue Center
- Cost of Goods Sold by Center
- Referral Revenue by Revenue Center
- Referral Summary by Revenue Center

†Summary reports use a combination of Client Home Practice, Logged in Practice, and Revenue Center

For more information about using a Cornerstone Multi-Location/Single Database configuration, call a Cornerstone Support Representative at 1-800-695-2877.