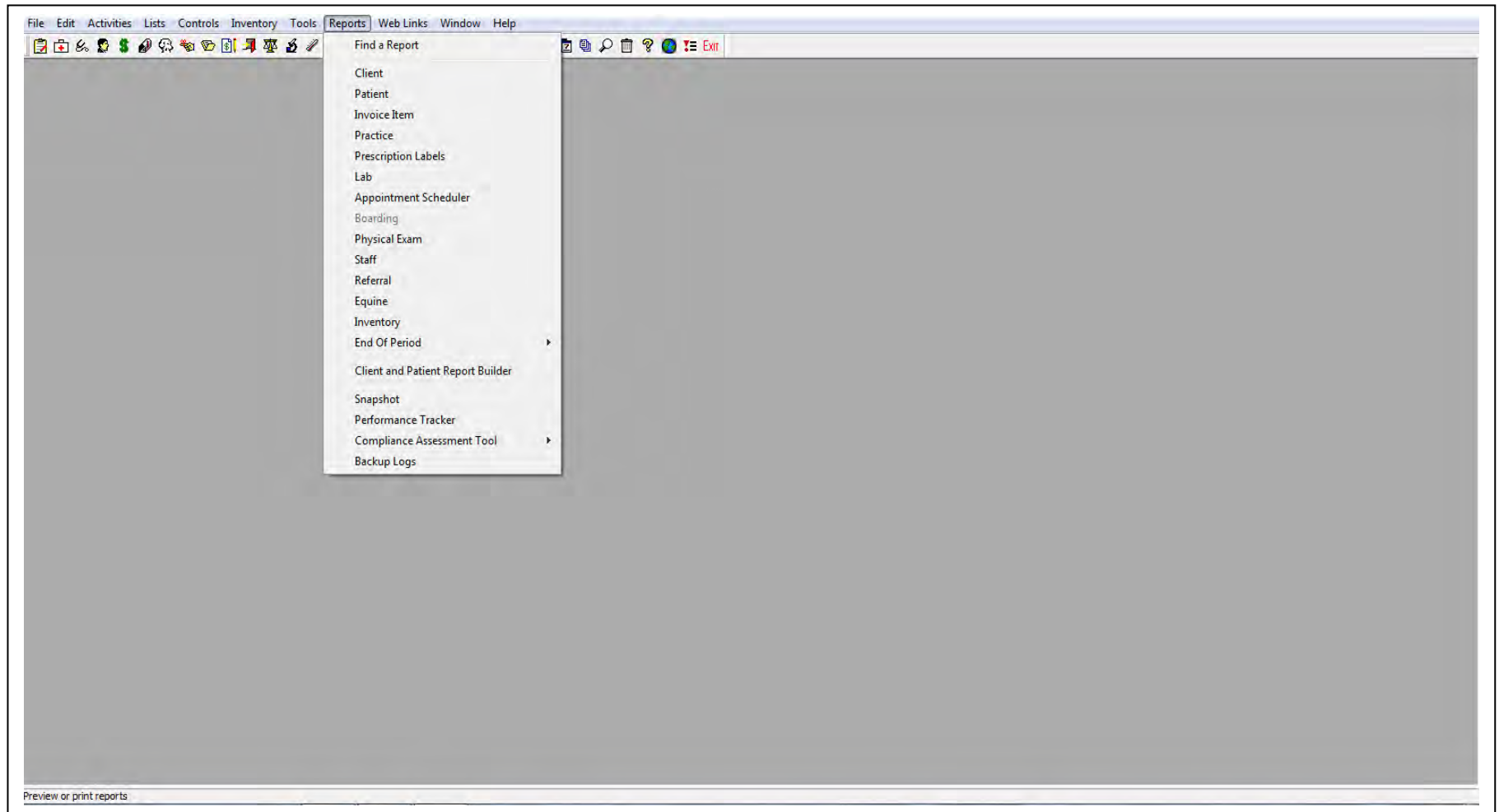


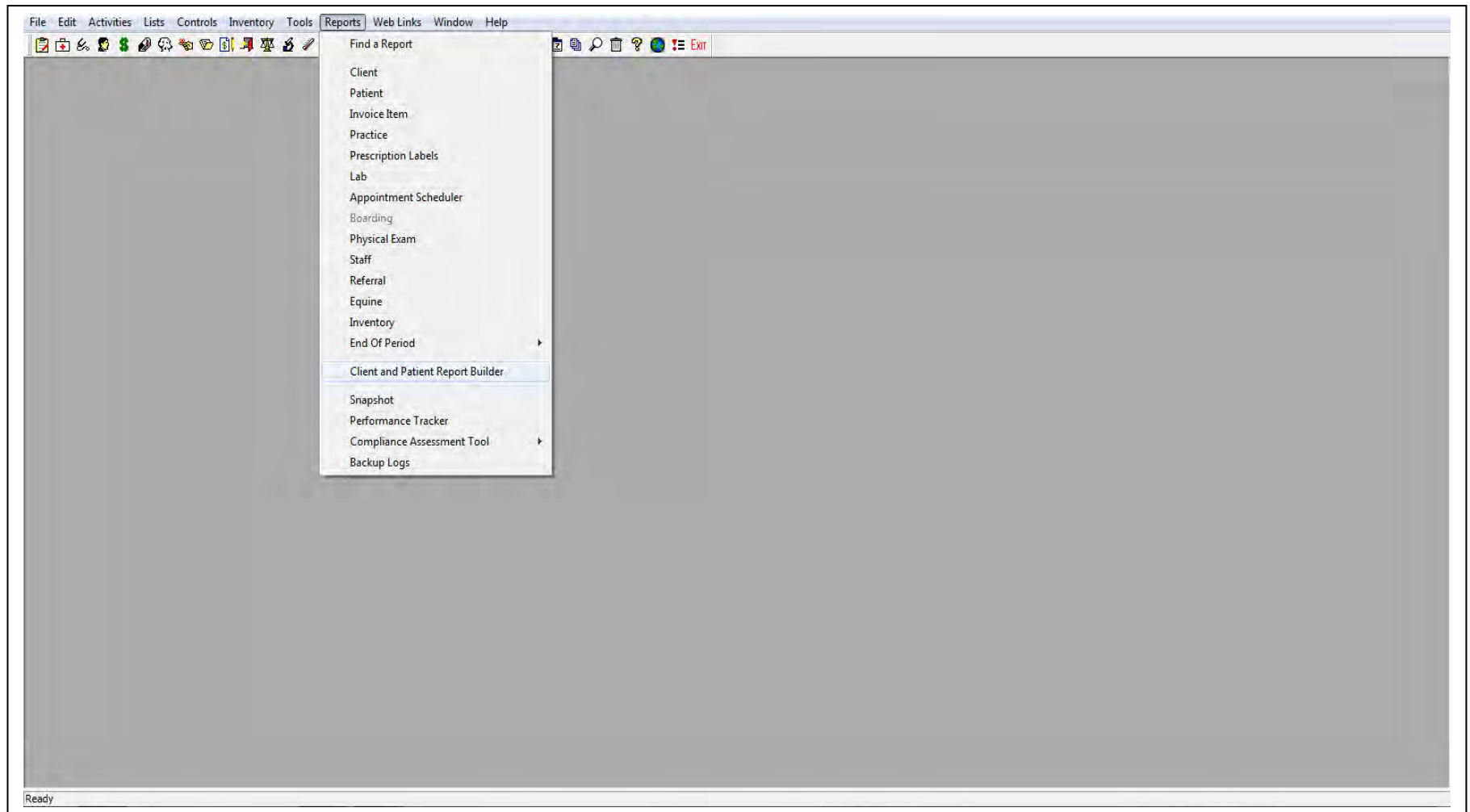


## Step-By-Step Instructions for Exporting the Cornerstone® Database

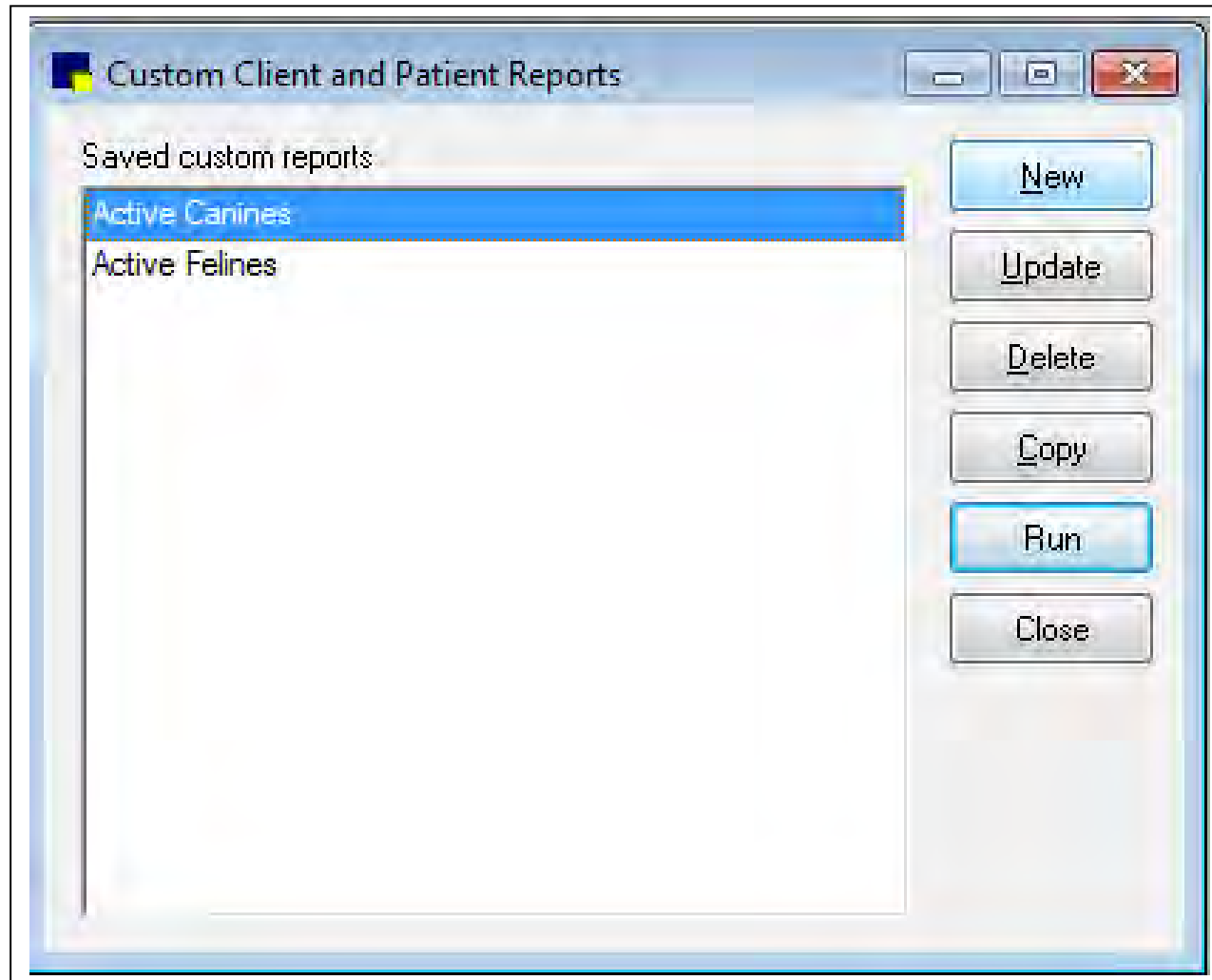
### 1. Select Reports tab on the top menu.



## 2. Select Client and Patient Report Builder.



3. Select the New button.



4. For "Report name" enter "Client and Patient Database".

New/Edit Custom Report

Report name:

List results in order of: Client ID  Range:  to   Show clients only

Save Cancel

**Client Information** Patient Information

Date record created: 00/00/0000 to 00/00/0000

Last invoice date: 00/00/0000 to 00/00/0000

Number of patients:  to

Sales this year:  to

Sales last year:  to

Home practice: (None)

Credit code: (None)

Postal code

- T2A 6A1,
- NoJ 1M0,
- NoB 150,
- NoB 1B0,
- NB 150,
- N4W 3K5,
- N3V 1A9,

Client balance

Under 30 days	Greater than	<input type="text"/>
30-60 days	Greater than	<input type="text"/>
60-90 days	Greater than	<input type="text"/>
90-over days	Greater than	<input type="text"/>
Total balance	Greater than	<input type="text"/>

Include inactive clients

Client classification

- Boarding Only
- Breeder
- Emergency Client
- Employee
- Grooming Only
- Humane Society
- No Services Until Paid

5. For "Date record created" enter 01/01/1900.

New/Edit Custom Report

Report name: Client and Patient Database

List results in order of: Client ID Range: to  Show clients only

Save Cancel

**Client Information** Patient Information

Date record created: 00/00/0000 to 00/00/0000

Last invoice date: 00/00/0000 to 00/00/0000

Number of patients: to

Sales this year: to

Sales last year: to

Home practice: (None)

Credit code: (None)

Postal code

- T2A 6A1,
- NoJ 1M0,
- NoB 1S0,
- NoB 1B0,
- NB 1S0,
- N4W 3K5,
- N3V 1A9,

Client balance

Under 30 days	Greater than	
30-60 days	Greater than	
60-90 days	Greater than	
90-over days	Greater than	
Total balance	Greater than	

Include inactive clients

Client classification

- Boarding Only
- Breeder
- Emergency Client
- Employee
- Grooming Only
- Humane Society
- No Services Until Paid

6. Select the Patient Information tab.

New/Edit Custom Report

Report name: Client and Patient Database

List results in order of: Client ID Range: to   Show clients only

**Client Information** Patient Information

Date record created: 01/01/1900 to 00/00/0000

Last invoice date: 00/00/0000 to 00/00/0000

Number of patients: to

Sales this year: to

Sales last year: to

Home practice: (None)

Credit code: (None)

Postal code:  
T2A 6A1,  
NoJ 1M0,  
NoB 1S0,  
NoB 1B0,  
NB 1S0,  
N4W 3K5,  
N3V 1A9,

Client balance

Under 30 days	Greater than	
30-60 days	Greater than	
60-90 days	Greater than	
90-over days	Greater than	
Total balance	Greater than	

Include inactive clients

Client classification:  
Boarding Only  
Breeder  
Emergency Client  
Employee  
Grooming Only  
Humane Society  
No Services Until Paid

Save

Cancel

7. For "Date record created" enter 01/01/1900.

New/Edit Custom Report

Report name: Client and Patient Database

List results in order of: Client ID Range: to   Show clients only

Save Cancel

Client Information Patient Information

Date record created: 00/00/0000 to 00/00/0000 Birth date range: 00/00/0000 to 00/00/0000

Last visit date: 00/00/0000 to 00/00/0000  Include inactive patients  Include deceased patients

Species Breed Sex Patient classification

Avian Male Boarding Only  
Bovine Female Breeding Animal  
Camelid CAUTION!  
Canine Neutered Male ER/Referral Patient  
Caprine Spayed Female Family Pet  
Rescue Animal

Items included in patient history

Item ID	Description
---------	-------------

Items not included in patient history

Item ID	Description
---------	-------------

Date range of items: 00/00/0000 to 00/00/0000 Date range of items: 00/00/0000 to 00/00/0000

Include all items  Include all patients



8. Select the Save button.

New/Edit Custom Report

Report name: Client and Patient Database

List results in order of: Client ID Range: to   Show clients only

Client Information **Patient Information**

Date record created: 01/01/1900 to 00/00/0000 Birth date range: 00/00/0000 to 00/00/0000

Last visit date: 00/00/0000 to 00/00/0000  Include inactive patients  Include deceased patients

Species: Avian, Bovine, Camelid, Canine, Caprine

Breed:

Sex: Male, Female, Neutered Male, Spayed Female

Patient classification: Boarding Only, Breeding Animal, CAUTION!, ER/Referral Patient, Family Pet, Rescue Animal

Items included in patient history

Item ID	Description
---------	-------------

Items not included in patient history

Item ID	Description
---------	-------------

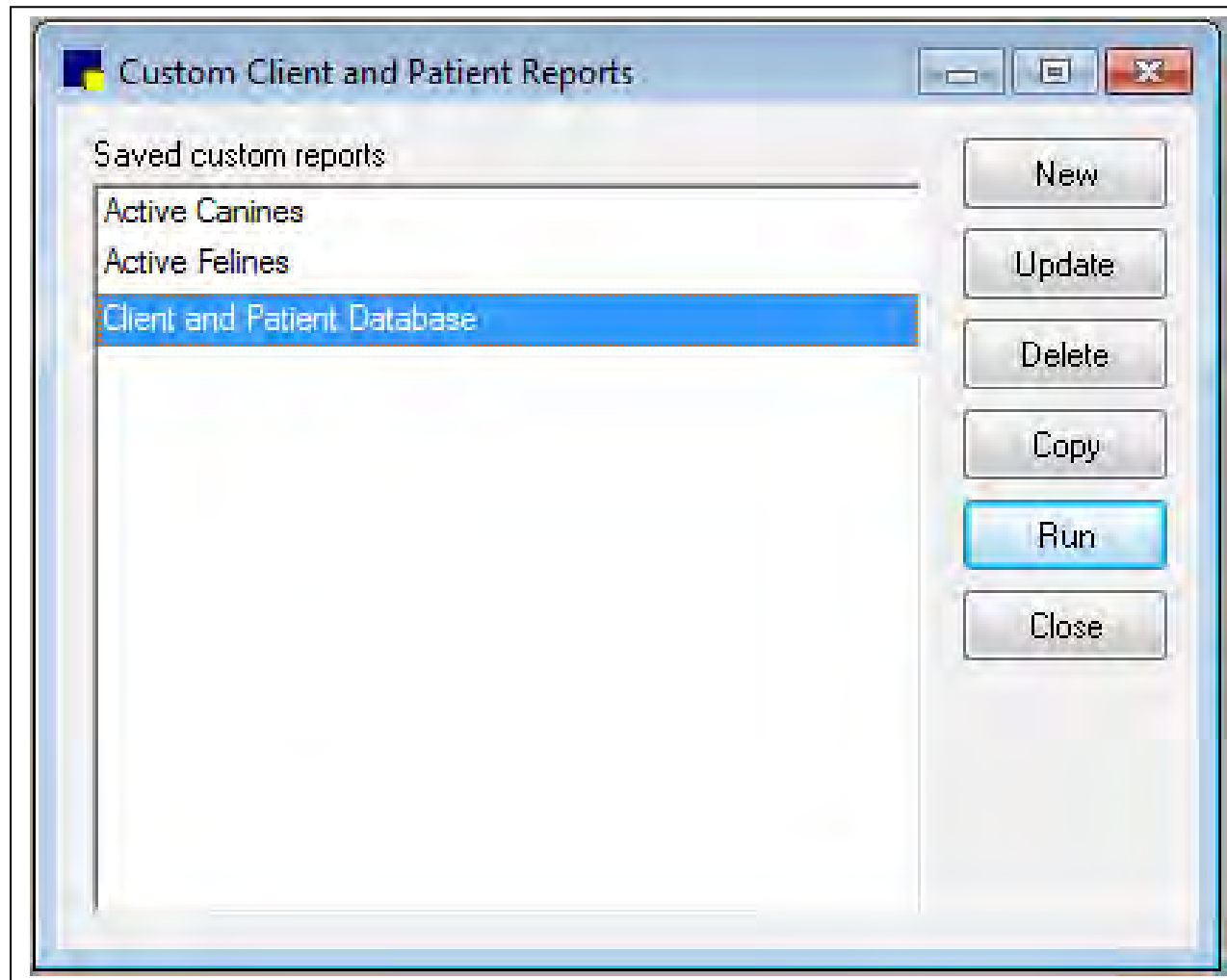
Date range of items: 00/00/0000 to 00/00/0000 Date range of items: 00/00/0000 to 00/00/0000

Match all criteria  Match all criteria

Save Cancel



9. Select the Run button.



10. Select the Save button.

Print Preview

Print Labels Save Close

Selected total 12759 of 12759 Page 1 of 631

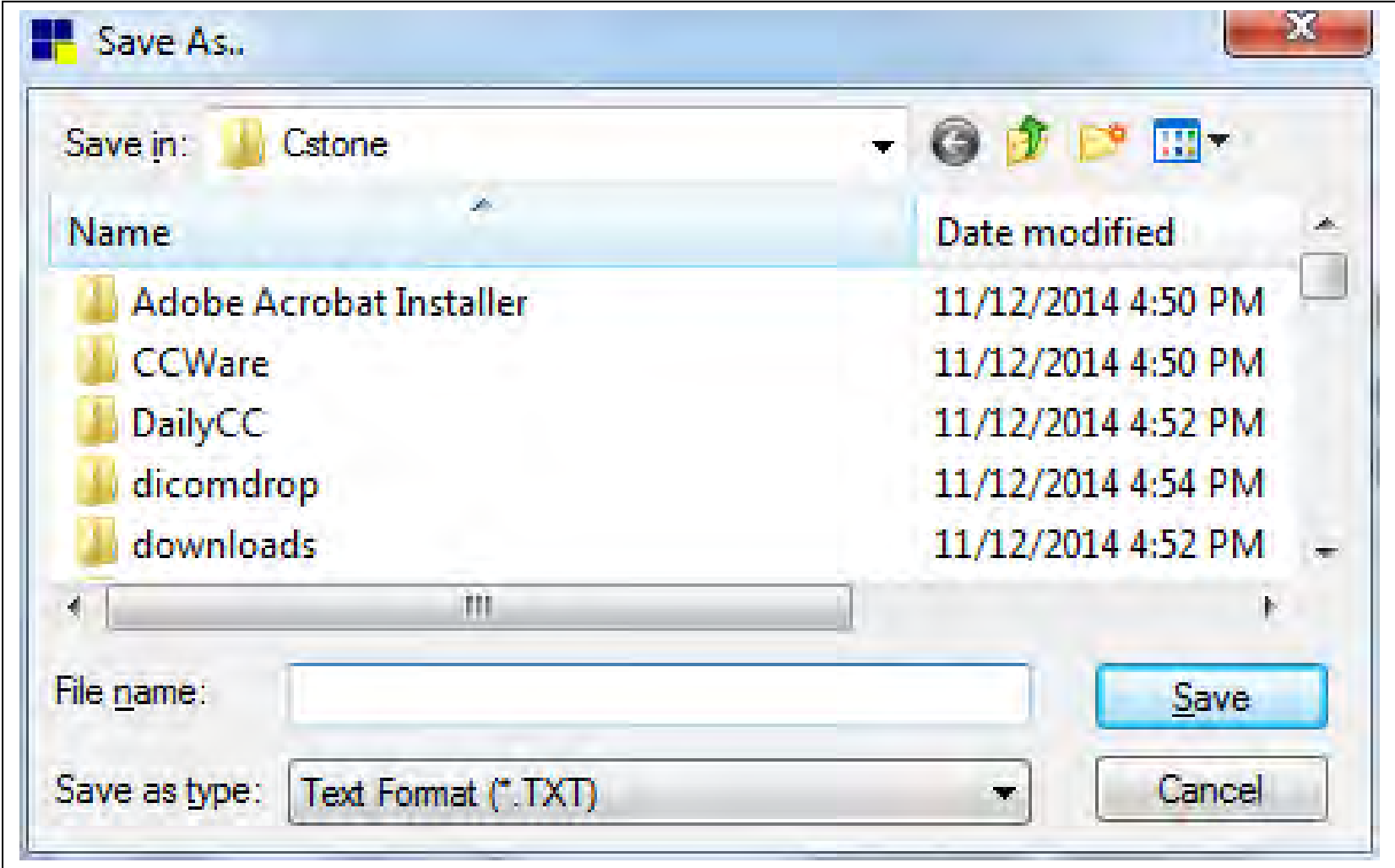
### Client and Patient Database Sorted by Client ID

Client ID	Client Name	Phone	Classification	Sales This Year	Sales Last Year	
Patient ID	Patient Name	Patient Status	Species	Breed	Sex	Classification
1	, William		Pet Owner			
33	Snuff	Active	Other Small	Other Small		Family Pet
10004	Jamie		Pet Owner			
18819	Chico	Active	Canine	Retriever, Labrador Mix	Neutered Male	Family Pet
19640	Nina	Active	Canine	Pitbull	Spayed Female	Family Pet
29533	Rody	Active	Feline	Shorthair, Domestic	Neutered Male	Family Pet
10012	Carlie		Pet Owner			
18085	Gratch	Active	Other Small	Other Small		Family Pet
18086	Quasi	Active	Reptile/Amphibian	Dragon, Bearded	Female	Family Pet
18433	Lameu	Active	Feline	Mediumhair, Domestic	Female	Family Pet
20198	Princess Leia	Active	Canine	Chihuahua	Spayed Female	Family Pet
30148	Chewie	Active	Canine	Chihuahua	Neutered Male	Family Pet
30423	Zoe	Active	Canine	Chihuahua	Female	Family Pet
30424	Bella	Active	Canine	Chihuahua	Female	Family Pet
30425	Corona	Active	Canine	Chihuahua	Male	Family Pet
30426	Gizmo	Active	Canine	Chihuahua	Male	Family Pet
30427	Snoop	Active	Canine	Chihuahua	Male	Family Pet
10013	Heather		Pet Owner			
13885	Ginger	Active	Canine	Bullmastiff	Spayed Female	Family Pet
10015	Geniene		Pet Owner			
17227	Humphrey	Active	Other Small	Other Small		Family Pet
1002	, Margaret		Pet Owner			
17335	Account	Active	Other Small	Other Small		Family Pet
10034	Lynn		Pet Owner			
45986	Rodi	Active	Canine	Bulldog, English	Spayed Female	Family Pet
1004	Nancy		Pet Owner			
1884	Shadow	Active	Other Small	Other Small		Family Pet
15811	Maggie	Active	Other Small	Other Small		Family Pet
10043	Theresa		Pet Owner			
17519	Buddy	Active	Canine	Lhasa Apso Mix	Neutered Male	Family Pet
10057	Rosemarie		Pet Owner			
17272	Ru	Active	Avian	Masaw, Green Winged	Female	Family Pet
10074	Jennifer		Pet Owner			
17298	Ludwig	Active	Other Small	Other Small		Family Pet
10079	Jill		Pet Owner			
29655	Siri	Active	Canine	Shepherd, German Mix	Spayed Female	Family Pet

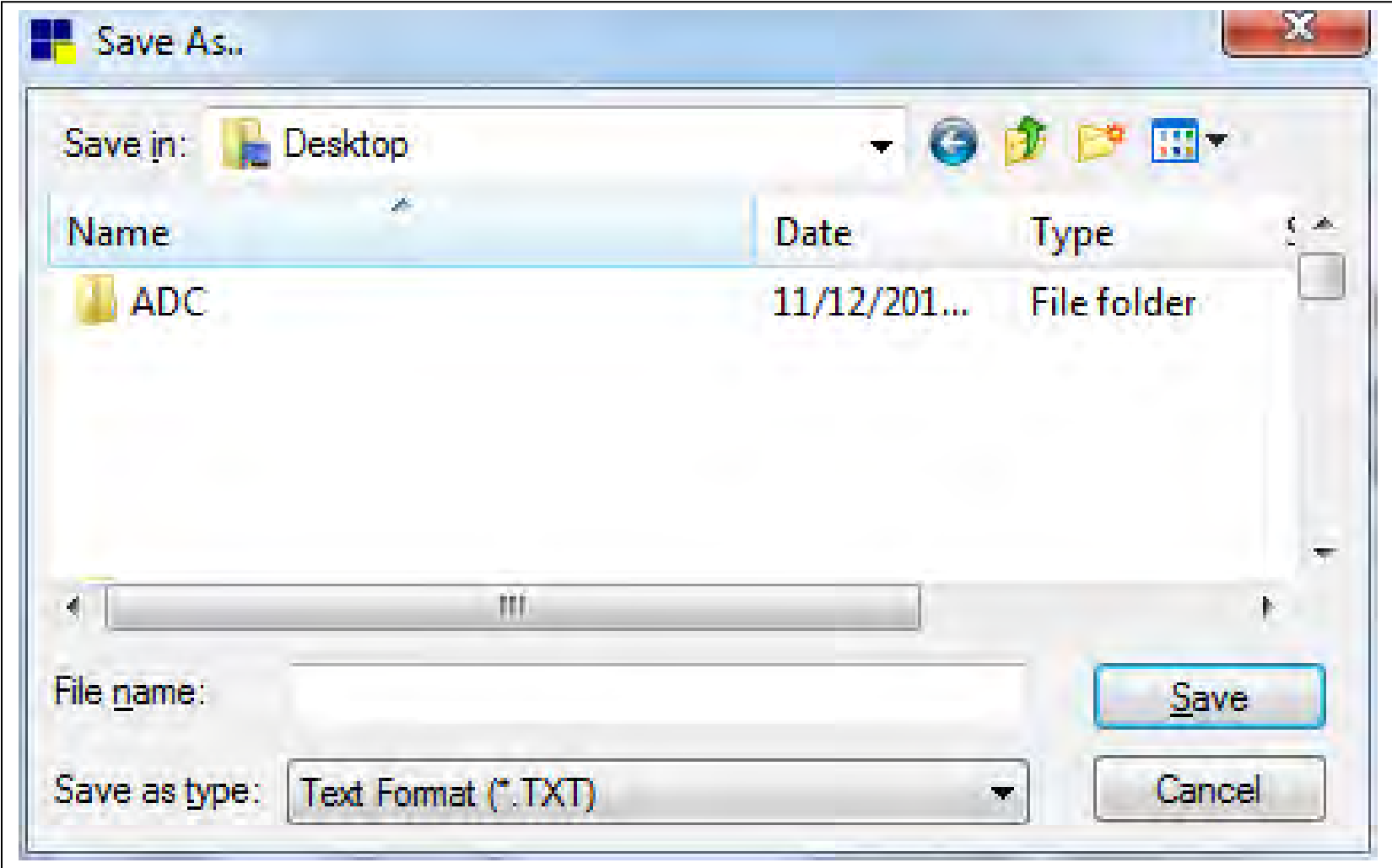
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Select the custom report you want to work with

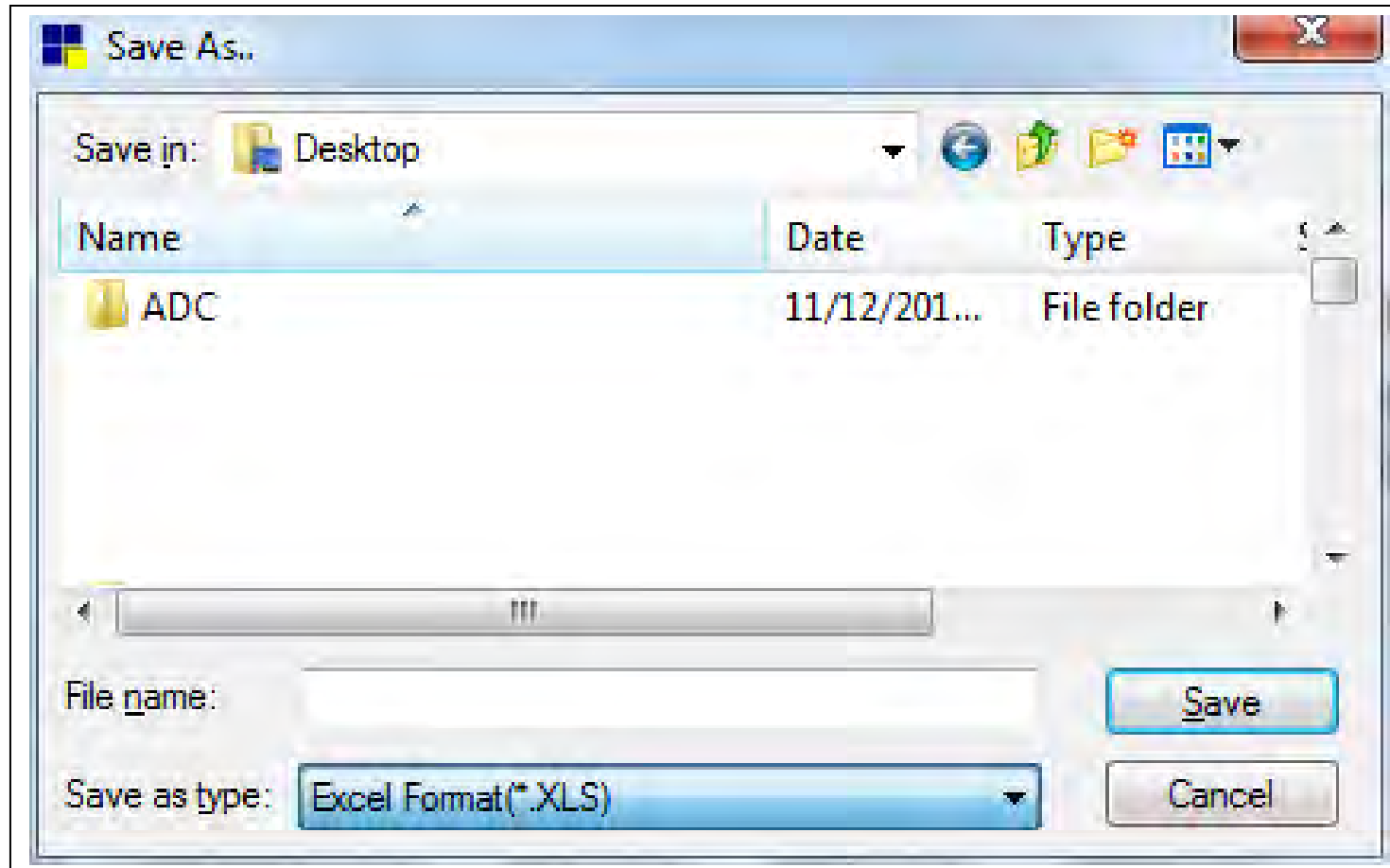
11. For "Save in", select "Up one folder button" with the green up arrow to show folders in the local drive.



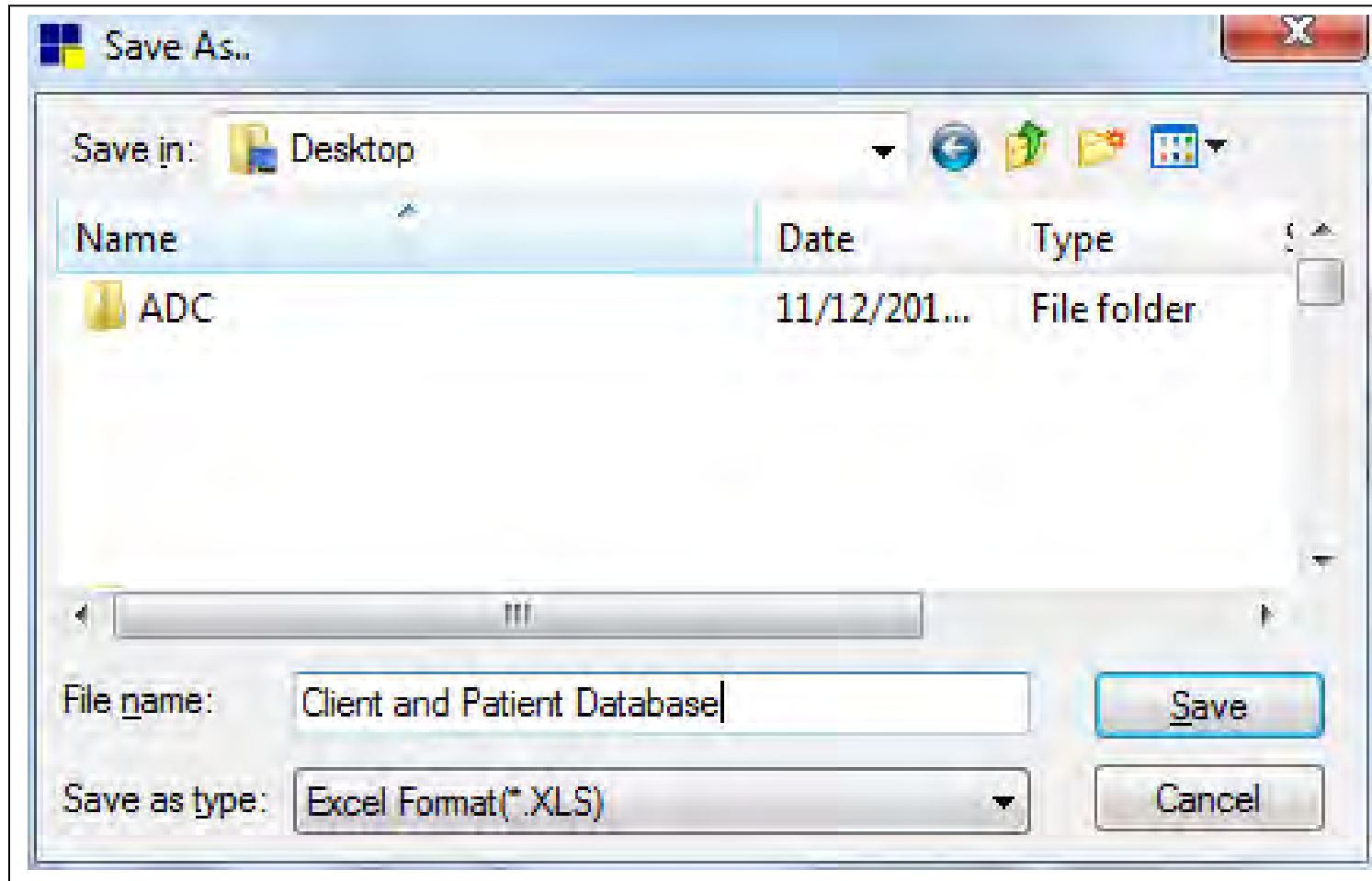
12. For "Save in" select the Desktop folder.



13. For “Save as type”, select Excel Format (\*.XLS) from the dropdown list.



14. Enter "Client and Patient Database" in the field for "File name", then select the Save button.



The icon for the file "Client and Patient Database .xls" will now be on your computer's Desktop.

You can also search your local drive, then open the "Desktop" folder to view or copy the file, "Client and Patient Database.xls".