How to Find Required Data for the Practice Owners Economic Survey Using Cornerstone

**Active Clients, New Clients, Invoices and Gross Revenue**
This section will walk you through how to find statistics on active clients, new clients, invoices, and gross revenue in Cornerstone.

1. Select “Reports” from the toolbar
2. Pick “Performance Tracker” option
3. In the “Tracking Period” box, highlight the past 12 full months. This is done by clicking first on the most recent full month, then scrolling up 12 months prior, and, while holding the “Shift” key, clicking on the appropriate month, thereby highlighting a full 12 month period
4. Leave the “Comparison Period” box as is; this section is not relevant to the statistics we are seeking
5. Click the “Retrieve” button. Cornerstone may generate an error message regarding overlapping data, simply click the “Yes” button to proceed

Report “Gross Sales” under the “Tracking Period” heading as Total veterinary revenue on the Practice Owners Economic Survey

Report “Total Number of Invoices” under the “Tracking Period” heading as Invoices on the Practice Owners Economic Survey

Report “Number of new clients” under the “Tracking Period” heading as New clients on the Practice Owners Economic Survey

Report “Number of clients with sales” under the “Tracking Period” heading as Active clients on the Practice Owners Economic Survey
Active Clients, New Clients, Invoices and Gross Revenue – Steps One and Two

Step One

Step Two
Active Clients, New Clients, Invoices and Gross Revenue – Steps Three through Five

### Step Three

- Gross sales: 1,398,479.55
- Manual discounts: 
- Preset discounts: 
- Net sales: 
- Total number of invoices: 13,123
- Average gross per invoice: 
- Average net per invoice: 
- Total accounts receivable: 
- Average gross income per doctor: 
- Average number of invoices per doctor: 
- Average total collected net doctor: 

<table>
<thead>
<tr>
<th>Description</th>
<th>Tracking Period</th>
<th>Compare Period</th>
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<tbody>
<tr>
<td>Total number of invoices:</td>
<td>13,123</td>
<td></td>
</tr>
<tr>
<td>Number of new clients:</td>
<td>407</td>
<td></td>
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<tr>
<td>Number of clients with sales:</td>
<td>1,784</td>
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</tr>
<tr>
<td>Average net spend per client:</td>
<td></td>
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</tbody>
</table>

### Step Four

Record these

### Step Five

[Image of Performance Tracker window]
Overview of Sources of Revenue
This section will walk you through how to find an overview of sources of revenue in Cornerstone.

1. Select “Reports” from the toolbar
2. Pick “End of Period” option
3. From this menu, pick “End of Month”
4. Within the “Report list” box, select the title “Inventory Sales Report – Closed Invoices – By Class By Desc.”
5. Within the “Monthly periods” box, select the past 12 full months. This is done by clicking first on the most recent full month, then scrolling up 12 months prior, and, while holding the “Shift” key, clicking on the appropriate month, thereby highlighting a full 12 month period
6. Click the “Preview” button
7. This will generate a pop-up titled “End of Period Filters”; simply leave this pop-up as is, and click the “OK” button
8. (Optional) To facilitate addition of categories for reporting, click on “Save” button and then set “Save as type” to “Excel format”. This will allow the report to be opened in Excel, and thus figures to be added together in a more simple manner

Revenue will be presented in a variety of class descriptions, as outlined in your set up of Cornerstone. Group each class description into one of the following: professional services, food sales, drug/medication sales, or other revenue (e.g. grooming, boarding). Add the income reported from all class descriptions within a given source, and record within the Practice Owners Economic Survey (e.g. add up income from examinations, surgeries, dentistry, etc. and record as revenue from professional services).

Report revenues generated from the sales of drugs and medications within the appropriate area on the Practice Owners Economic Survey

Report revenues generated from food sales within the appropriate area on the Practice Owners Economic Survey

Report revenues generated from professional services within the appropriate area on the Practice Owners Economic Survey

To generate detailed breakdowns of revenue sources, refer to final two sections of this document.
Overview of Sources of Revenue – Steps One through Three

Step One

Step Two

Step Three
Overview of Sources of Revenue – Steps Four through Seven
## Overview of Sources of Revenue – Figures to Record

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</table>

**Examples of drug and medications revenue**

**Examples of food revenue**

**Examples of professional services revenue**

Record these
Fees
This section will walk you through how to find your fees in Cornerstone.

1. Select “Lists” from the toolbar
2. Pick “Invoice Item” option
3. Use “Description” field to search for procedures, or browse through the list below
4. Procedures that are billed as a group will have a price of $0.00. In order to determine the price, highlight the procedure and click the “Update” button. This will open the “Invoice Item Information” box
5. Within the “Invoice Item Information” box, click on the “Group Items” tab. This will show a list of the grouped items and their individual prices, as well as the total price

Report the “Price” or “Amount” for various procedures to the appropriate fee fields within the Practice Owners Economic Survey
Fees – Steps One and Two

Step One

Step Two
Fees – Steps Three and Four

**Step Three:**
- Record these

**Step Four:**
- Update
- Delete

Record these
Fees – Step Five

Step Five:

Record these

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<tr>
<th>Group Items</th>
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<th>Amount</th>
<th>Shipped?</th>
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<td>1</td>
<td>SC0077</td>
<td>K9 Ovariectomy 10-20 kg</td>
<td>1.0</td>
<td>$310.4</td>
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<td>2</td>
<td>SC0053</td>
<td>K8 IV - Catheterization with Surgery</td>
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<td>K8 Injection - pain management</td>
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<td>$27.8</td>
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<td>5</td>
<td>760</td>
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<td>6</td>
<td>SC0010</td>
<td>K8 Complimentary nail trim</td>
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<td>$0.0</td>
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<td>7</td>
<td>863</td>
<td>Puppy Program Discount</td>
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</table>

Total: $403.40
Detailed Breakdown of Inventory Revenue Sources

This section will walk you through how to find a detailed breakdown of inventory sales for sources of revenue in Cornerstone

1. Select “Reports” from the toolbar
2. Pick “End of Period” option
3. From this menu, pick “End of Month”
4. Within the “Report list” box, select the title “Inventory Sales Report – Closed Invoices – By Class By Desc.”
5. Within the “Monthly periods” box, select the past 12 full months. This is done by clicking first on the most recent full month, then scrolling up 12 months prior, and, while holding the “Shift” key, clicking on the appropriate month, thereby highlighting a full 12 month period
6. Click the “Preview” button
7. This will generate a pop-up titled “End of Period Filters”; simply leave this pop-up as is, and click the “OK” button
8. (Optional) To facilitate addition of categories for reporting, click on “Save” button and then set “Save as type” to “Excel format”. This will allow the report to be opened in Excel, and thus figures to be added together in a more simple manner

Report revenues generated from the sales of drugs and medications within the appropriate area on the Practice Owners Economic Survey

Report revenues generated from food sales within the appropriate area on the Practice Owners Economic Survey
Detailed Breakdown of Inventory Revenue Sources – Steps One through Three

Step One

Step Two

Step Three
Detailed Breakdown of Inventory Revenue Sources – Steps Four through Seven

Step Four

Step Five

Step Six

Step Seven
Detailed Breakdown of Veterinary Services Revenue Sources
This section will walk you through how to find a detailed breakdown of inventory sales for sources of revenue in Cornerstone

1. Select “Reports” from the toolbar
2. Pick “End of Period” option
3. From this menu, pick “End of Month”
4. Within the “Report list” box, select the title “Serv. Sales Report – Closed Invoices – By Class By Desc.”
5. Within the “Monthly periods” box, select the past 12 full months. This is done by clicking first on the most recent full month, then scrolling up 12 months prior, and, while holding the “Shift” key, clicking on the appropriate month, thereby highlighting a full 12 month period
6. Click the “Preview” button
7. This will generate a pop-up titled “End of Period Filters”; simply leave this pop-up as is, and click the “OK” button
8. (Optional) To facilitate addition of categories for reporting, click on “Save” button and then set “Save as type” to “Excel format”. This will allow the report to be opened in Excel, and thus figures to be added together in a more simple manner

Report revenues generated from professional services within the appropriate area on the Practice Owners Economic Survey
Detailed Breakdown of Veterinary Services Revenue Sources – Steps One through Three

Step One

Step Two

Step Three
Detailed Breakdown of Veterinary Services Revenue Sources – Steps Four through Seven

If you have any questions about finding data, please consult your software representative, or contact the OVMA office for instructions. Phone: 800.670.1702 or email: cdoherty@ovma.org

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### Monthly Reports

<table>
<thead>
<tr>
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<th>Processed</th>
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</thead>
<tbody>
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</tr>
<tr>
<td>8/29/14</td>
<td>August 29, 14 08:10 PM</td>
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<td>9/30/14</td>
<td>September 30, 14 07:03 PM</td>
</tr>
<tr>
<td>11/03/14</td>
<td>November 03, 14 08:18 PM</td>
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### Report list

- Serv. and Inv. Sales - Closed Inv. - By Class ID
- Serv. and Inv. Sales - Closed Inv. - By Staff ID
- Serv. and Inv. Sales - Closed Inv. - By Staff Last Name
- Serv. and Inv. Sales by Revenue Center - Class Desc
- Serv. and Inv. Sales by Revenue Center - Class ID
- Serv. and Inv. Sales by Revenue Center - Staff ID
- Serv. and Inv. Sales by Revenue Center - Staff Last Name
- Serv. Sales Report - Closed Invoices - By Class By Desc
- Serv. Sales Report - Closed Invoices - By Class By ID
- Serv. Sales Report by Revenue Center - by Class Desc
- Serv. Sales Report by Revenue Center - by Class ID
- Split Invoices Report
- Statistics By Species Report - Closed invoices
- Statistics By Staff Report - Closed Invoices
- YTD Net Sales by Center

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If you have any questions about finding data, please consult your software representative, or contact the OVMA office for instructions. Phone: 800.670.1702 or email: cdoherty@ovma.org