Create Recent Search File to Fetch Reviews Cornerstone



To create a new Fetch Reviews output file in Cornerstone:

- Click Reports
- Then Client and Patient Report Builder



Select the Fetch Reviews report and click Update

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Rew/Edit Custom Report	
Report name: Fetch Reviews	Save
List results in order of: Client ID 🗨 Range: to	Show clients only
Client Information Patient Information	Lancel
Date record created: 00/00/0000 📥 to 00/00/0000 📥	Client balance
	Under 30 days Greater than
Last invoice date: 04/19/2016 🔶 to 04/19/2016 🚖	30-60 days Greater than 🗨
Number of patients: to	60-90 days Greater than 📼
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Sales last year: to	
Home practice:	
Credit code: (None)	Include inactive clients
Postal code	Client classification
94605,	No Services Until Paid
88012,	No Statement Client
76367,	Owner
76133,	Pet Owner E
72034, -	Unspecified -

Change the Last invoice date to cover dates you wish to Fetch Reviews for

- We recommend daily or weekly
 - If daily, both dates will be current date
 - If weekly, choose 7 days prior and the current date

Click **Save** button when complete



Select Fetch Reviews and click Run

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When the search completes you will see the **Print Preview** as above. Click the **Save** button on the top of the preview, this will open the **Save** dialog.

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To save these results and prepare them for Review Retrievers:

- Choose where to save the file, we recommend your **Desktop**
- Choose Comma Separated(.csv) as the file type
- Set File name, we recommend using **DDMMYY** format

You are now ready to Fetch Reviews from your Review Retriever's account!