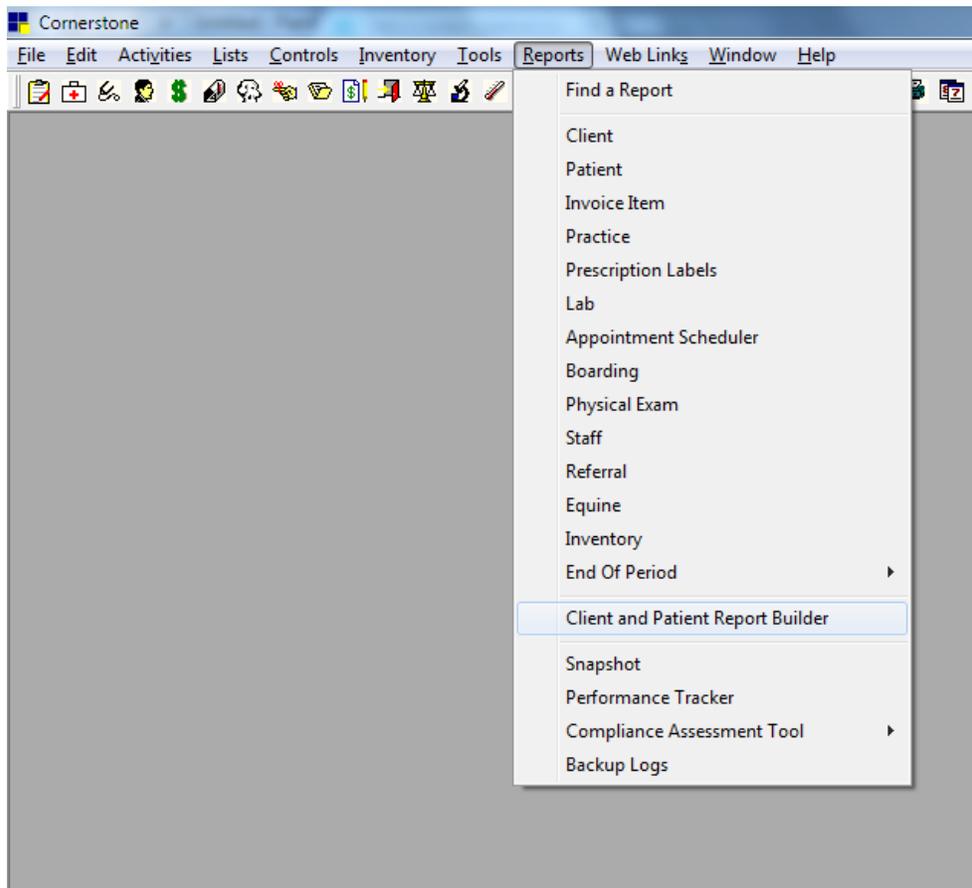
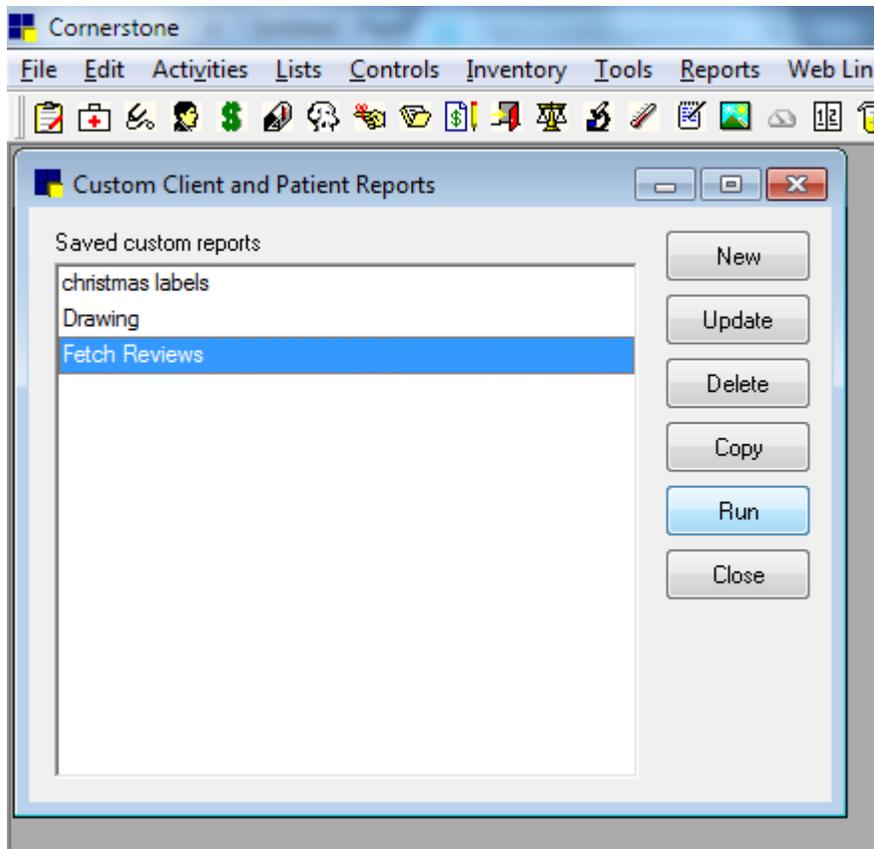


Create Recent Search File to Fetch Reviews Cornerstone



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**

Cornerstone

File Edit Activities Lists Controls Inventory Tools Reports Web Links Window Help

New/Edit Custom Report

Report name: Fetch Reviews

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: 04/19/2016 to 04/19/2016

Number of patients: to

Sales this year: to

Sales last year: to

Home practice:

Credit code: (None)

Postal code: 94605, 88012, 78657, 76367, 76133, 73737, 72034

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"/>

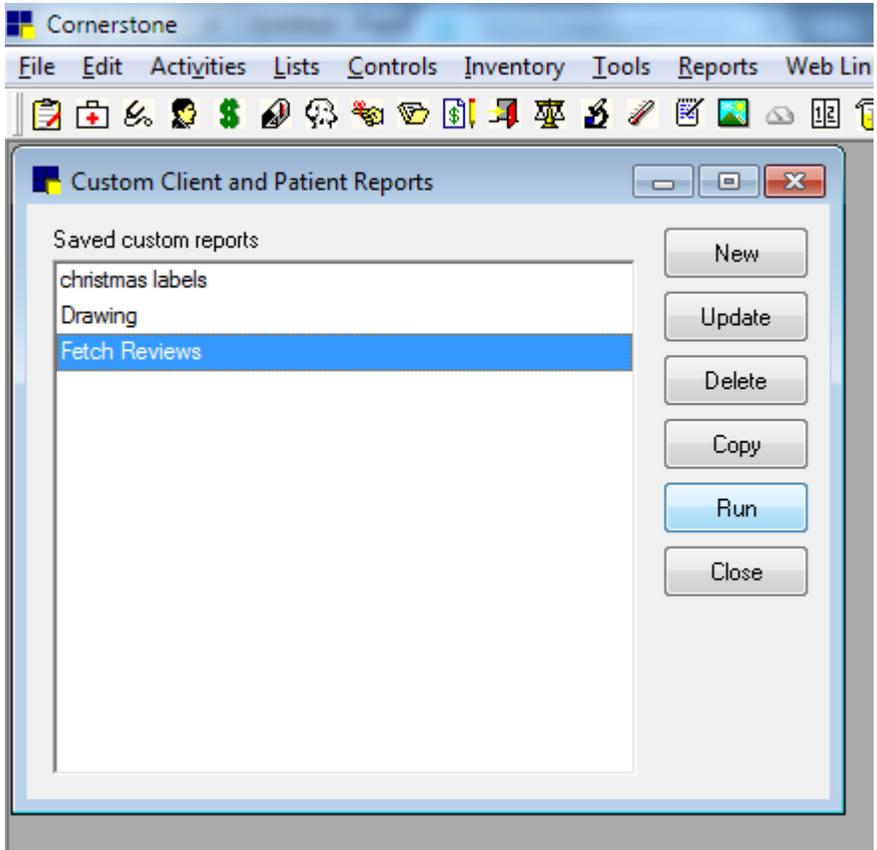
Include inactive clients

Client classification: No Services Until Paid, No Statement Client, No Statements or Reminders, Owner, Pet Owner, Rescue Group, Unspecified

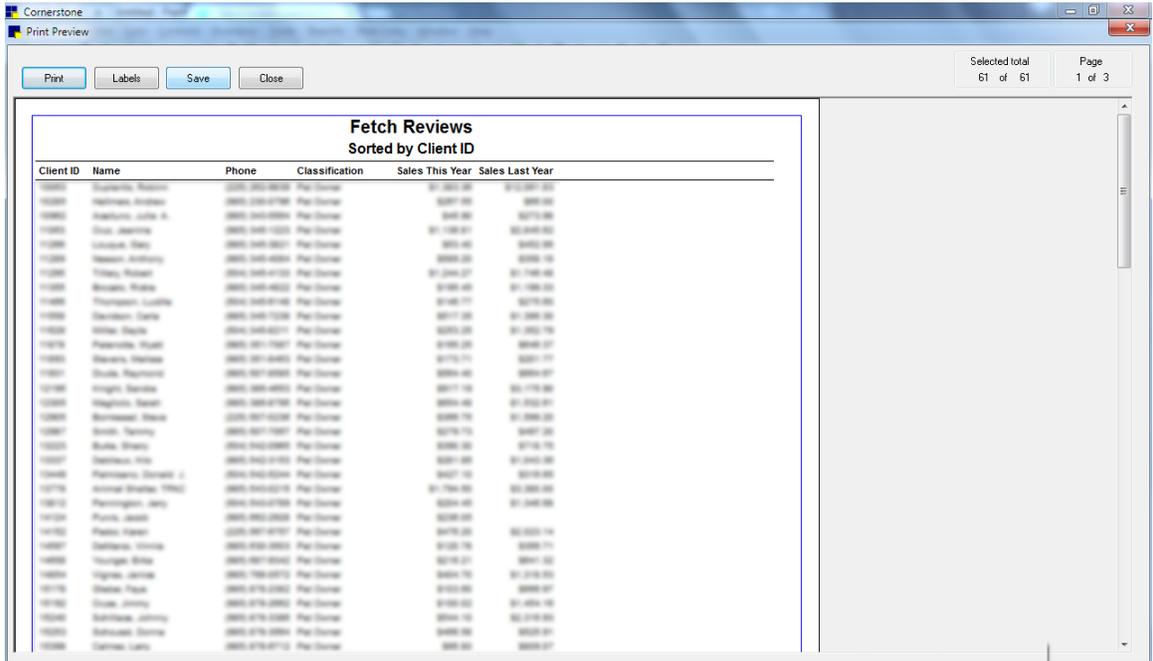
Change the **Last invoice date** to cover dates you wish to Fetch Reviews for

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

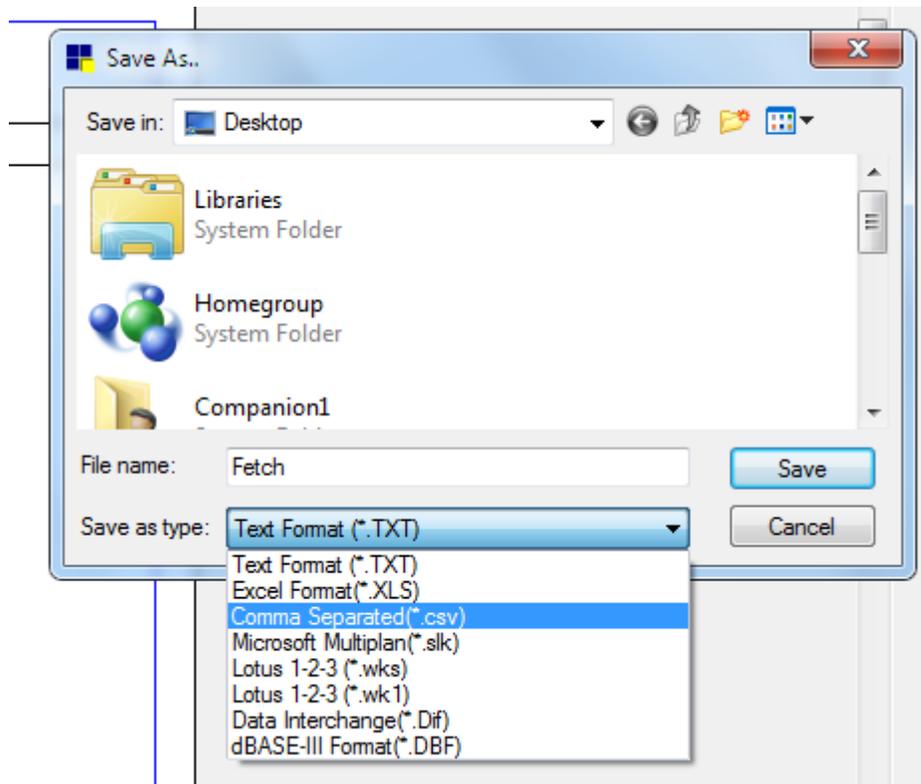
Click **Save** button when complete



Select **Fetch Reviews** and click **Run**



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.



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!