

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:

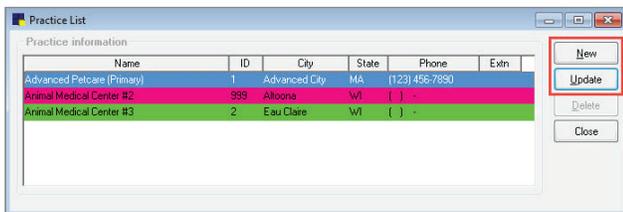
- Add a practice and designate it as the primary practice.
- Assign a workstation's default practice.
- Assign clients to a home practice.
- Create cashier IDs and revenue centers.

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

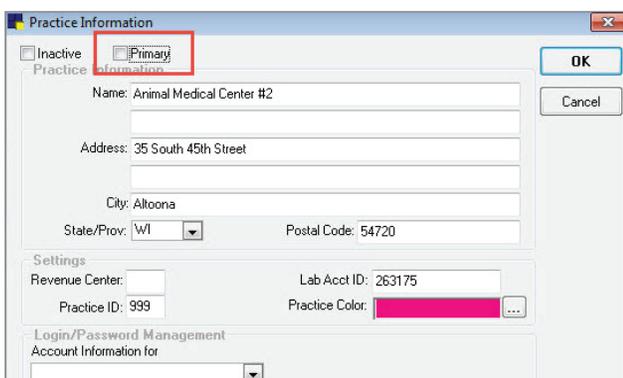
Adding a practice and designating it as the primary practice

Be sure to designate one practice as the primary practice. This practice cannot be flagged as inactive.

1. Go to **Lists > Practice**, and then click **New** or **Update**.



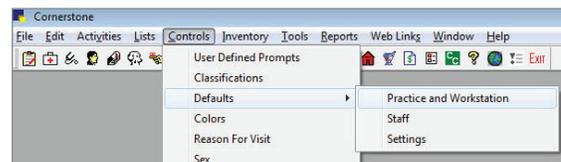
2. To designate this practice as the primary, select the **Primary** check box.



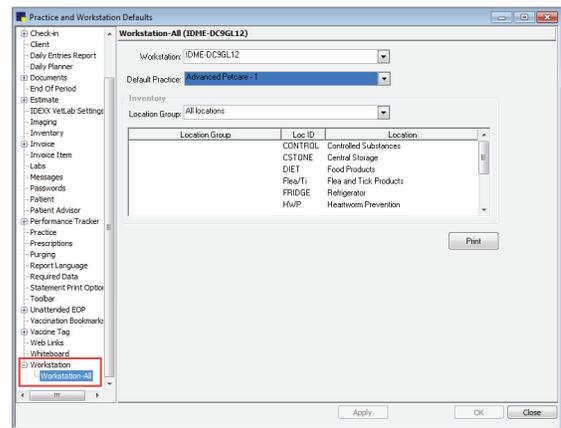
3. Enter or update the practice information.
Tip: Next to the **Practice Color** box, click the three dots (...) to choose a practice color. When a staff member logs on to the practice, the practice and staff member names appear in that color in the lower right corner of the screen.
4. Click **OK**.

Assigning a workstation's default practice

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.

When a staff member logs on, he or she will have access to the default practice's information.

Tip: If you select None, the primary practice becomes the default for this workstation.

4. Click **OK**.

Tip: To log on to a different practice, a staff member can always select **File > Switch Logged In Practice**. The logged-on practice can always be changed, regardless of default settings.

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.

	Name	Client ID	City	State	Postal Code	Area Code	Practice ID
<input type="checkbox"/>	Little, Jeff	9044	Westbrook	ME	04092	207	1
<input type="checkbox"/>	Kuhn, Paul	9061	Westbrook	ME	04092		1
<input type="checkbox"/>	Miller, Mike	9067	Westbrook	ME	04092		1
<input type="checkbox"/>	Myrick, Christine	9070	Westbrook	ME	04092	207	1

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**.

	Name	Client ID	City	State	Postal Code	Area Code	Practice ID
<input checked="" type="checkbox"/>	Little, Jeff	9044	Westbrook	ME	04092	207	1
<input checked="" type="checkbox"/>	Kuhn, Paul	9061	Westbrook	ME	04092		1
<input checked="" type="checkbox"/>	Miller, Mike	9067	Westbrook	ME	04092		1
<input checked="" type="checkbox"/>	Myrick, Christine	9070	Westbrook	ME	04092	207	1

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**.

Cashier Name	Cashier ID
Christine Myrick	CM
Cornerstone	CS
Sue Smith	SS1
Sue Smith	SS2

2. When prompted, enter an administrator user name and password.
3. Enter the cashier information, including a cashier ID, user name, and password.

Cashier ID Information

Cashier ID: Status: Active

Cashier name:

Password:

Confirm password:

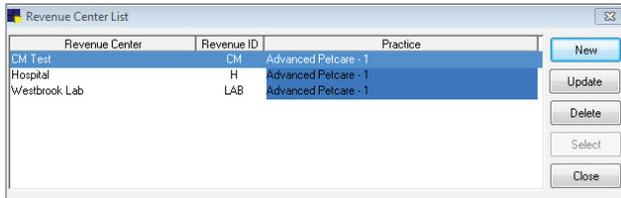
Tips:

- 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. For example, if the cashier's initials are RT, the cashier's ID for practice 1 might be "1RT" and the ID for practice 2 might be "2RT."
4. Click **OK**.

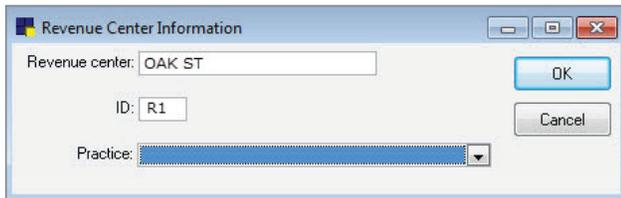
Creating or updating revenue centers

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 (Example: Daily Summary Report – By Practice). Assigning practices to revenue centers allows you to separate these items by practice: sales, taxes (including different tax rates) and discounts.

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.
4. Click **OK**.

Multi-Location/Single Database reports

Reports that display data by practice:

- Daily Payment Register – By Practice
- New Client Report – By Practice
- Daily Summary Report – By Practice

Reports that display data by revenue center:

- Itemized Audit Trail for Revenue Center
- Serv. And Inv. Sales by Revenue Center
- YTD Net Sales by Center

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