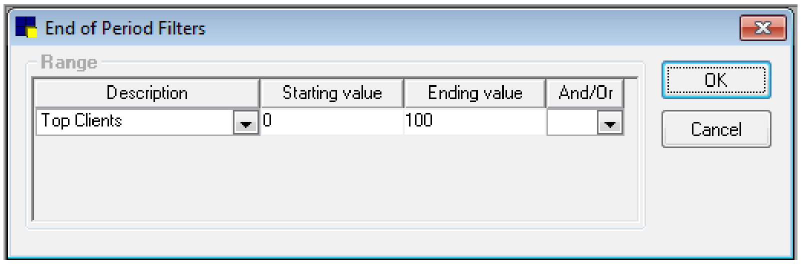
How to Create a List of Top Clients

1. Go to **Reports** > **End of Period** > **End of Year**, and then select **High/Low Client Sales Report**.
   OR
   a. Go to **Reports** > **Find a Report**,
   b. Type **"top client"** (including quotation marks) in the Search box, and then click **Search**.
   c. Select **High/Low Client Sales Report**, and then click **Create Report**.
2. In the Yearly periods area, select **Current** to create a list of top clients from this year. (To select multiple years, hold the **CTRL** key while selecting each year you want to include.)
3. Double-click the report in the list or click **Preview**.
4. For a list of all your clients and what they have spent in your practice, click **OK**, and then print or save the report.
5. To refine your list, in the Range area, select one of the following filters from the **Description** drop-down list, and then enter a range of values in the **Starting value** and **Ending value** fields (all values must be manually entered):
   - **90 Day Balance**—To find clients with overdue balances, enter a range of dollar amounts; the higher dollar amount should be in the **Ending value** field.
   - **Amount**—To find all clients who spent over a certain dollar amount, enter the dollar amount in the **Starting value** field and enter "999999" in the **Ending value** field.
   - **Practice ID**—To find all clients within a specific practice, in Cornerstone, go to **Lists** > **Practice** to find the correct practice ID. Enter the practice ID in both fields.
   - **Status**—Enter **active** or **inactive** in both fields to find only active or inactive clients.
   - **Top Clients**—Enter **0** in the **Starting value** field and the number of clients you want to include in the **Ending value** field. For example: enter 0 and 500 to get your top 500 clients.
6. To further refine your list, select **AND** or **OR** in the **And/Or** column to add more range filters.

   Notes: Select AND to show results that meet both criteria. Select OR to show results that meet either criteria. Ranges of the same type must be separated by OR. If using both AND and OR within the same report, you must select AND first.
7. Click **OK**; from the Preview window, you can print or save the report.



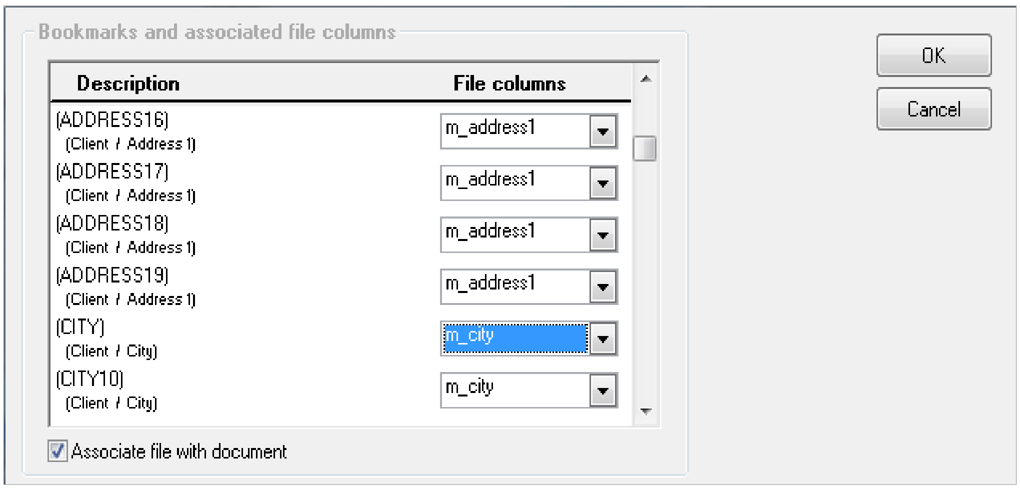
This report generates a list of the top 100 clients.

Merge the report with address labels (optional)

1. On the report preview window, click **Save**.
2. In the Save As dialog box, select **Desktop** from the **Save in** drop-down list, enter a name for the file (such as TopClients2013), and then select **Comma Separated(*.csv)** from the **Save as type** drop-down list.
3. Go to **Activities > Correspondence**.
4. Select **Merge from file**, click **Browse**, select **Desktop** from the **Look in** drop-down list, and then double-click the saved file.
5. In the **Find Template** area, verify that the **Search for word** check box is selected (select it, if needed).
6. In the **Title or ID** box, enter **label** or the name of your address label template; select the template from the list and then click **OK** to open the Merging window.

   Tip: Use the Sample Mailing Template to set up your label template.

   The **Description** column displays the bookmarks in the document.
7. Use the **File columns** drop-down lists to select the file column that corresponds to the bookmark. For example, match Firstname in the **Description** column with firstname in **File columns**. If a message appears asking you to match all similar fields, click **Yes**. Otherwise, match each row.



8. To remove a client from the list, in the **File records** area, clear the check box next to the client name.
9. To print your labels, click **OK**. A test page is printed and a message asks whether the page printed correctly.
   a. Click **Yes** to print the rest of the labels, or click **No** to reprint the first page.
   b. Click **Cancel** to close the window and restart the merge at step 3.

   Note: For detailed instructions on merging, press **F1** on the Start New Document window to open online Help, and then type **merge** in the keyword field on the **Index** tab. To watch a short video, visit idexxlearningcenter.com, go to **On Demand Learning > Snippets > Practice Management**, and select **Choose Holiday Mailing Labels** from the drop-down list.

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