



CCH® Coolbar

Maximize your productivity by linking Practice Management to Microsoft® Outlook.

Minimize your time spent toggling between applications with CCH Coolbar, the add-on feature for ProSystem fx Practice Management that lets you increase productivity and reduce errors.

Make sure the data you need is always at your fingertips. CCH Coolbar lets you look up lists of contacts, client details, actions, time entries, financial information and work in progress without leaving Microsoft® Outlook.

With CCH Coolbar, from within Microsoft® Outlook, you can:

- Create time entries.
- Enter time in the Practice Management timesheet.
- View client contact management data.

You can even use CCH Coolbar to automatically link time entries to Microsoft® Outlook appointments and tasks!

CENTRALIZED DATA

Take advantage of access to a DataCenter tool that lets you view lists of contacts, contact details, and actions like time entries, appointments, tasks and emails.

For each client, you can also view detailed financial information such as accounts receivable, cash receipts, posted invoices and work in progress. All client data is easily filtered, so you see exactly the information you need, when you need it. DataCenter lists are then easily exported to Microsoft® Excel or HTML.

AUTOMATIC TIMESHEET ENTRY

Manual timesheet entry can result in duplicated work, inaccuracies and lost billable time. CCH Coolbar provides timesheet entry directly within Microsoft® Outlook, either from a toolbar icon or through automatic capture of relevant data from Microsoft® Outlook appointments and tasks.

With this add-on, your firm can benefit from:

- **Increased Billings** – Time entry items can be created from Microsoft® Outlook appointments and tasks, allowing you to dramatically reduce effort and increase accuracy in capturing billable hours.
- **Improved Employee Productivity** – Eliminate the need to switch between applications, and your staff will be better able to focus on billable activities.
- **Rapid ROI** – CCH Coolbar has a minimal learning curve for Microsoft® Outlook users.



CCH Coolbar automates your time entry, improving productivity and data accuracy.



EFFECTIVE CONTACT COMMUNICATION

With CCH Coolbar, all of your client communication is accessible from one central location.

You have the option to log all appointments, tasks and email messages, and create a link between your contact communication and the firm's clients, engagements and other contacts in ProSystem fx Practice Management.

The result is a list of appointments, tasks, emails and attachments that can be sorted, grouped and filtered by client, staff, date and more, giving you:

- **More Effective Client Service** – You'll see the entire client picture at one time and in one place.
- **Better Knowledge Sharing** – Relevant client knowledge is made available to your staff, as soon as they need it.

For more information on CCH® Coolbar
call 1-800-PFX-9998 (1-800-739-9998)
or visit CCHGroup.com

The most up-to-date product information, including detailed system requirements, enhancements, and new features, is available at CCHGroup.com/PracticeManagement. If you plan to use multiple ProSystem fx Suite products within the same system, call 1-800-PFX-9998 (1-800-739-9998) and ask to speak to your sales representative about whether or not your system availability is adequate.

All trademarks and copyrights are property of their respective owners.



CCH

a Wolters Kluwer business

1-800-PFX-9998 (1-800-739-9998)
CCHGroup.com