

AP Follow User Manual

AP Follow - An add-in program for the ToDo system in Time Matters

Contents

| | |
|--|----|
| 1. Introduction | 2 |
| 1.1. What is the AP Follow?..... | 2 |
| 1.2. Why Use the AP Follow System? | 2 |
| 1.3. Simplicity and Consistency | 2 |
| 1.4. Peace of Mind..... | 3 |
| 2. How to Use the AP Follow System | 4 |
| 3. Setup Guide for AP Follow | 6 |
| 3.1. Add a Classification Code | 6 |
| 3.2. Customize the Event Form Style | 8 |
| 3.3. Customize the ToDo Form Style | 12 |
| 3.4. Customize Other Dated Form Styles | 16 |
| 3.5. Copy apfollow.exe to C:\Programs Folder | 16 |
| 3.6. Test the Customizations | 17 |
| 4. Product License Agreement | 18 |

Click on any topic.

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1. Introduction

1.1. What is the AP Follow?

AP Follow is an add-in program for Time Matters that is the heart of the AP Follow System. This system allows you to deal with a common barrier to getting more done: Waiting on responses from other people.

The AP Follow system uses Follow Up fields and the AP Follow program to automatically create Follow Up reminder records in your ToDo list. This guide shows you how to use the AP Follow System and how to customize your Time Matters to make it work. AP Follow is sold for \$18 per concurrent user by Active Practice LLC.

To order AP Follow, go to: <https://www.securemyfirm.com/collections/time-matters-guides/products/ap-follow-for-time-matters>

Note: AP Follow works with *all versions* of Time Matters, from version 7.0 on up.

1.2. Why Use the AP Follow System?

Time Matters already has a method for following up on things you need to do. The "Follow" checkbox in a Time Matters record can be checked, causing its Date field to be updated daily to today's date. This Follow feature makes your old ToDo's show up in today's ToDo section of your Time Matters Calendar.

Disadvantages of the Time Matters "Following" feature **without AP Follow:**

1. Your list of Today's ToDo's can become overwhelming.
2. You cannot see the original date of each ToDo.
3. You cannot choose a specific future date for a Follow Up.
4. You cannot easily see which ToDo's have become stale.
5. Records checked "Follow" are scattered across multiple lists.

Advantages of AP Follow System:

1. You set the best future date for a Follow Up.
2. You can quickly set a Follow Up from any dated record.
3. Follow Ups for ToDo's, Events, Documents and more appear together on your ToDo List.
4. The Date stays the same on the original records.
5. Follow Ups are easily distinguished from other kinds of ToDo's.

1.3. Simplicity and Consistency

The keys to succeeding with a ToDo system are simplicity and consistency. The system needs to be simple enough that you will find it relatively effortless to use and keep up to date. If it is too complex, you may become discouraged and find yourself neglecting the system. Your consistency in using the ToDo system is the second key to success. Because it is simple and fast, you can work with it every day with little effort.

1.4. Peace of Mind

It is a great feeling to know you have all the important things you need to do captured in your ToDo system. When you get to the point where you trust yourself to use your system regularly, you will trust your system. You will feel confident about handling your work. One lawyer who did not have a good ToDo system described lying in bed on a Saturday night, wondering if there was some deadline he had missed that week. For that lawyer, peace of mind is the greatest reward from working with a trustworthy ToDo system.

2. How to Use the AP Follow System

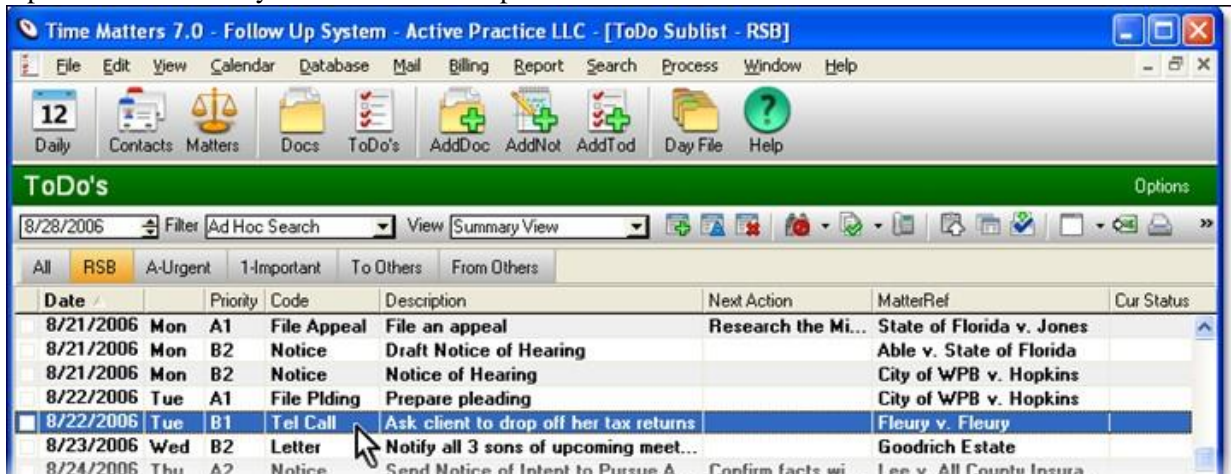
The AP Follow System creates reminders to follow up with other people if you have not heard from them. You can also use it to create reminders to yourself based on Events, ToDo's, Documents, and other records.

Consider this example. You need to review the tax returns of one of your clients. You have a ToDo record in Time Matters: "Ask client to drop off her tax returns." You can call your client and check Done on the ToDo record, but what if your client forgets to give you the returns? If you do not follow up with your client, work on the Matter could stagnate for an indefinite period of time. The Matter could "slip through the cracks." You can best serve your client by being proactive, calling if you have not heard back in, say, 10 days.

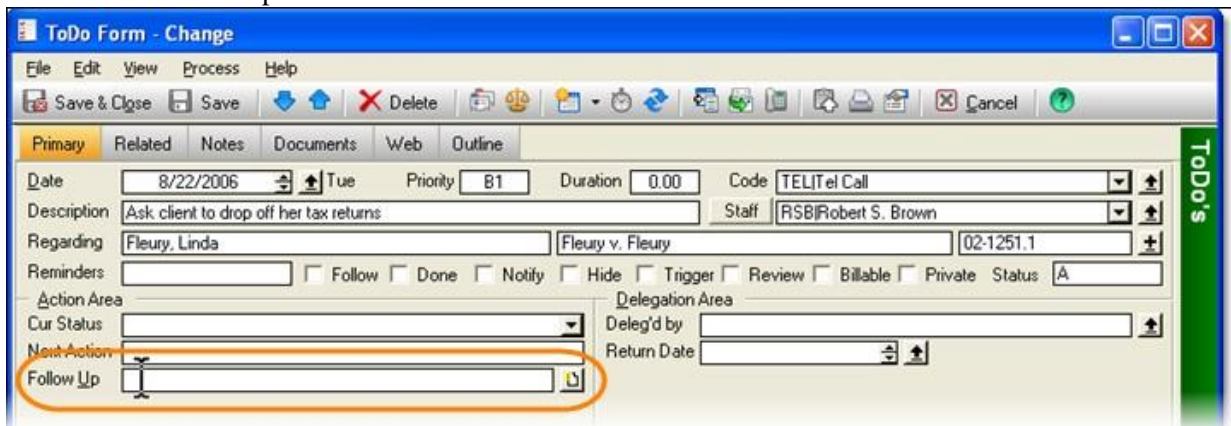
Use the AP Follow System to create a Follow Up record when you first realize that you need to wait on someone else. That can happen when you create a Document, receive an Email, add a ToDo record to your list, or check an Event on your calendar. You create a Follow Up record that inherits information from one of these records. The Follow Up record goes onto your ToDo list on a future date that you set. When that day arrives, you mark the record Done because the other person has responded or you take action to follow up on it.

Here is how you create a Follow Up record using the AP Follow System:

1. Open a ToDo record you want to follow up on.



2. Click in the Follow Up field.



3. Enter "10" in the Follow Up field, the number of days from today for the date of the Follow Up record.

The screenshot shows a form titled 'Action Area' with three input fields: 'Cur Status', 'Next Action', and 'Follow Up'. The 'Follow Up' field contains the number '10'. Below the fields is a 'Memo' section.

4. Press the Follow Up button

This screenshot is similar to the previous one, but a mouse cursor is pointing at a small icon (the 'Follow Up' button) located to the right of the 'Follow Up' input field.

5. AP Follow **creates these contents created automatically** in a new ToDo record:
 - a. The Date is set for 10 days from today, based on your entering the number 10.
 - b. The Code - FOLL - is entered.
 - c. The Description is copied from the original record and the words "Follow Up" are added at the front.
 - d. The Regarding field are filled in from the original record.

The screenshot shows the 'ToDo Form - Change' window. It has a menu bar (File, Edit, View, Process, Help) and a toolbar with various icons. The form is divided into several sections. A vertical green bar on the right side is labeled 'ToDo's'. The form contains the following fields and values:

- Date:** 9/07/2006 (highlighted with box 1)
- Priority:** 3
- Duration:** 0.00
- Code:** FOLL|Follow Up (highlighted with box 2)
- Description:** (Follow Up - Ask client to drop off her tax returns (highlighted with box 3)
- Regarding:** Fleury, Linda (highlighted with box 4)
- Regarding:** Fleury v. Fleury (highlighted with box 4)
- Reminders:** Follow, Done, Notify, Hide, Trigger, Review, Billable, Private, Status
- Action Area:** Cur Status, Next Action, Follow Up
- Delegation Area:** Deleg'd by, Return Date
- Chgd/Done:** 8/28/2006

This Follow Up record will appear on your ToDo list dated 10 days from today. If you display ToDo's on your Calendar, the record will also appear there 10 days from today. Using the AP Follow System allows you to follow up systematically on things you are waiting for from other people. It also allows you to quickly create reminders when you are working with various records in Time Matters. Because AP Follow automatically copies the Description and Regarding information and sets up the rest of the Follow Up record, you can use it quickly. That makes it more likely that you will make a habit of creating Follow Ups.

3. Setup Guide for AP Follow

A number of changes to Time Matters are needed to make the AP Follow System work. Each Time Matters database may have different customizations to its fields. To avoid overwriting your existing customizations, AP Follow does not have a Setup program that overwrites your Form Styles. Instead, you need to customize the Default Form Styles for Events, ToDo's and other dated records you want to follow up on. You also add one new Classification Code for ToDo's and copy the AP Follow program file.

Before making any changes, please:

1. Obtain permission, if necessary, from your organization before customizing Time Matters.
2. Back up your Time Matters database.

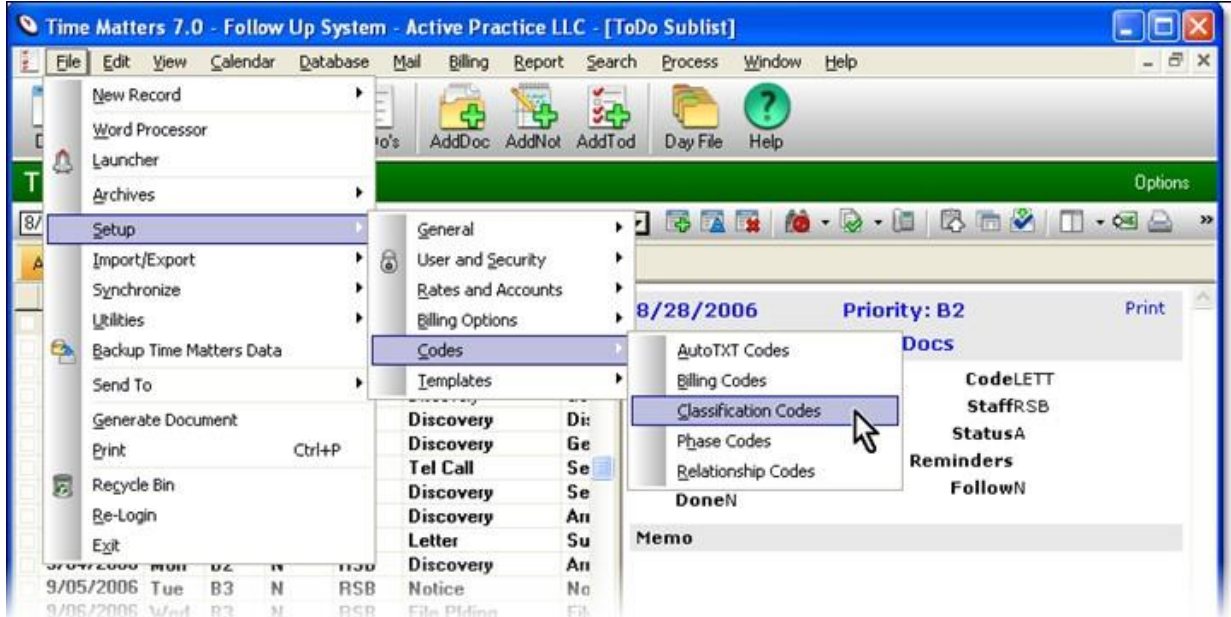
It may appear that you need to make a lot of changes. In fact, the Setup process involves just three kinds of changes:

1. Add a Classification Code for ToDo's
2. Customize a Follow Up field for each kind of record for which you want to follow ups
3. Copy the program, apfollow.exe, to a Program folder

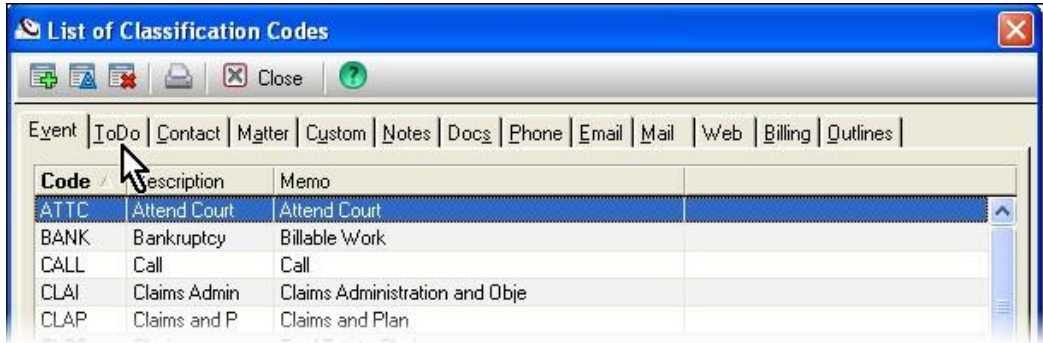
3.1. Add a Classification Code

Add a Classification Code for ToDo's: FOLL | Follow Up

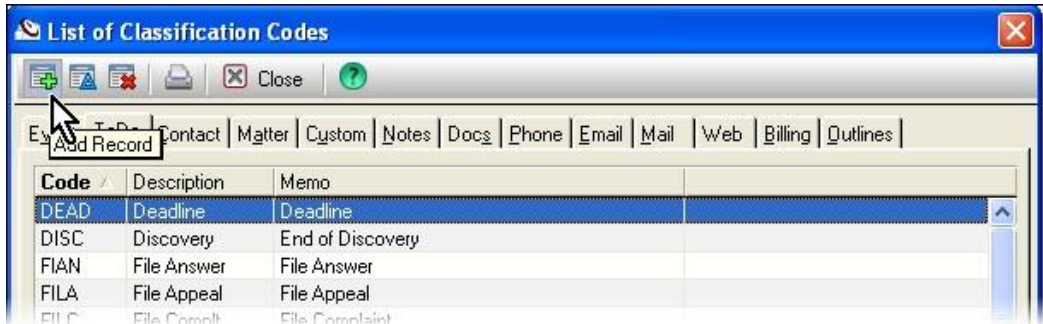
1. Go to: File | Setup | Classification Codes



2. Select: ToDo



3. Add Record



4. Fill in: FOLL and Follow Up. Press OK.

Code: FOLL Description: Follow Up

Memo:

AutoEntry: Classification Code

Code will have the following color: Classification Code

No Attached Form Style

Additional Code Settings

Reminders:

Duration: 0.00 Following Initially "On"

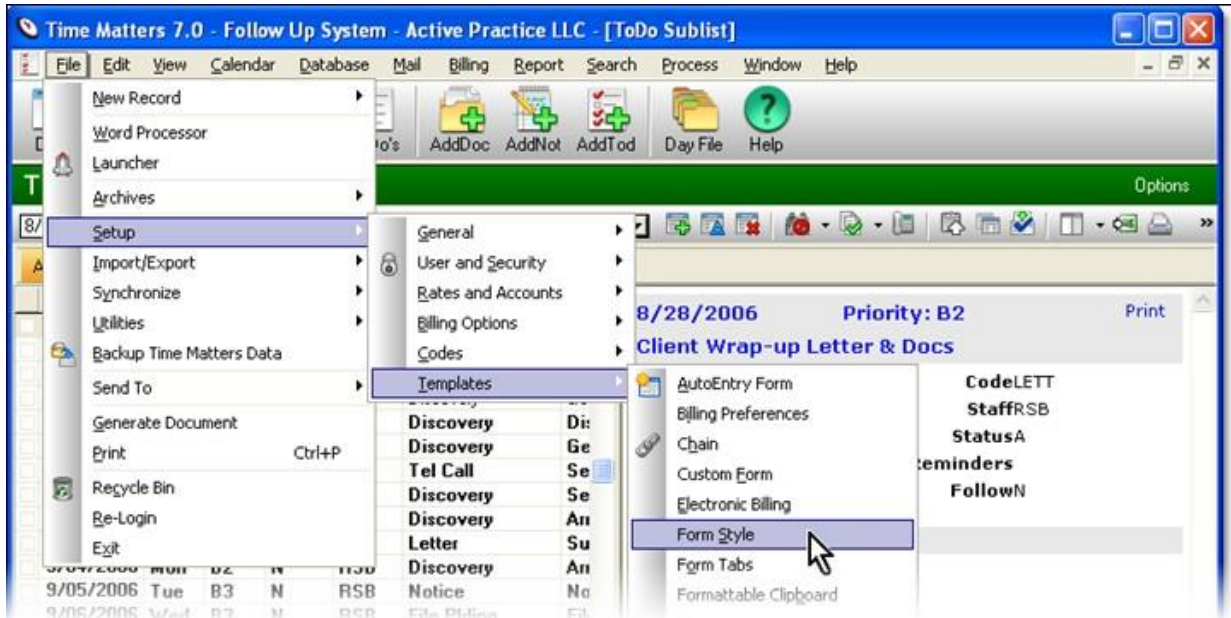
Priority: Hide

Matching Billing Code:

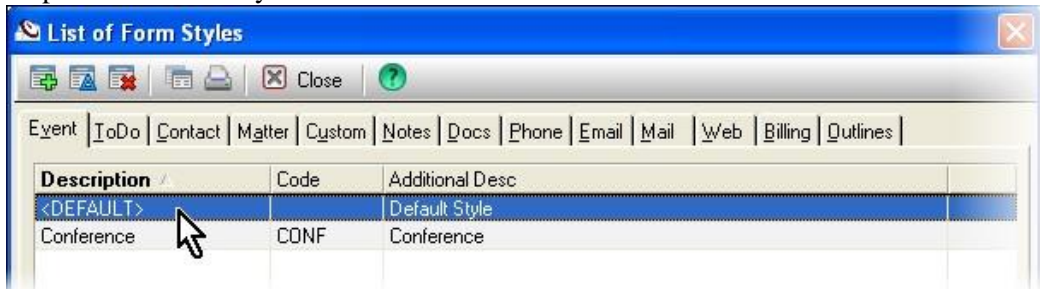
Help OK Cancel

3.2. Customize the Event Form Style

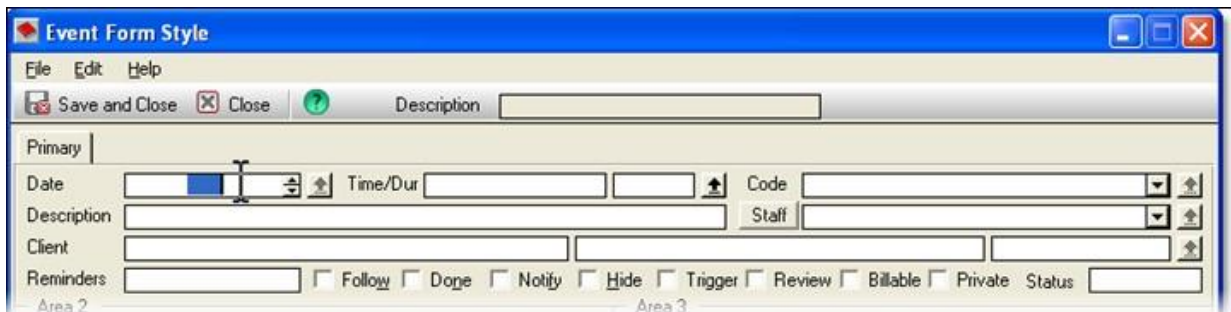
Customizing a User field on the Event Form will allow you to quickly create a Follow Up ToDo record reminding you to take some action concerning an Event on your calendar. You can also customize other types of forms, such as Document, Email and Phone forms, by following the same steps. 1. Go to: File | Setup | Templates | Form Style



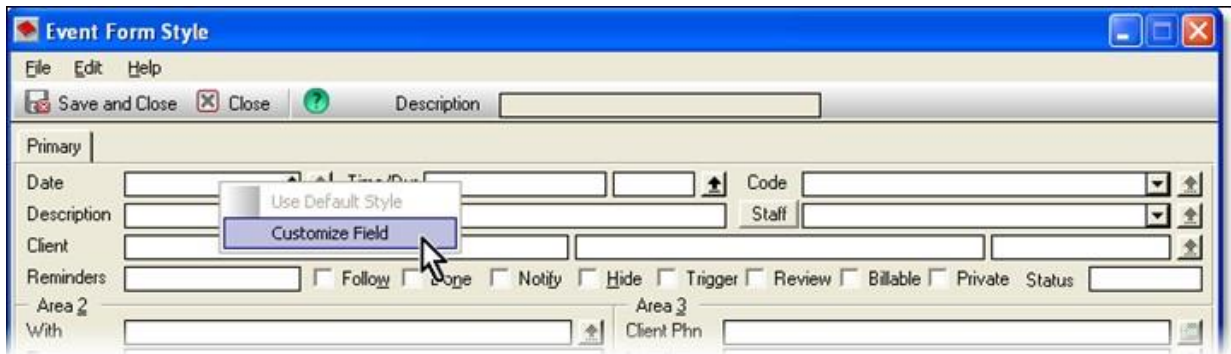
2. Open the Default Style for Event



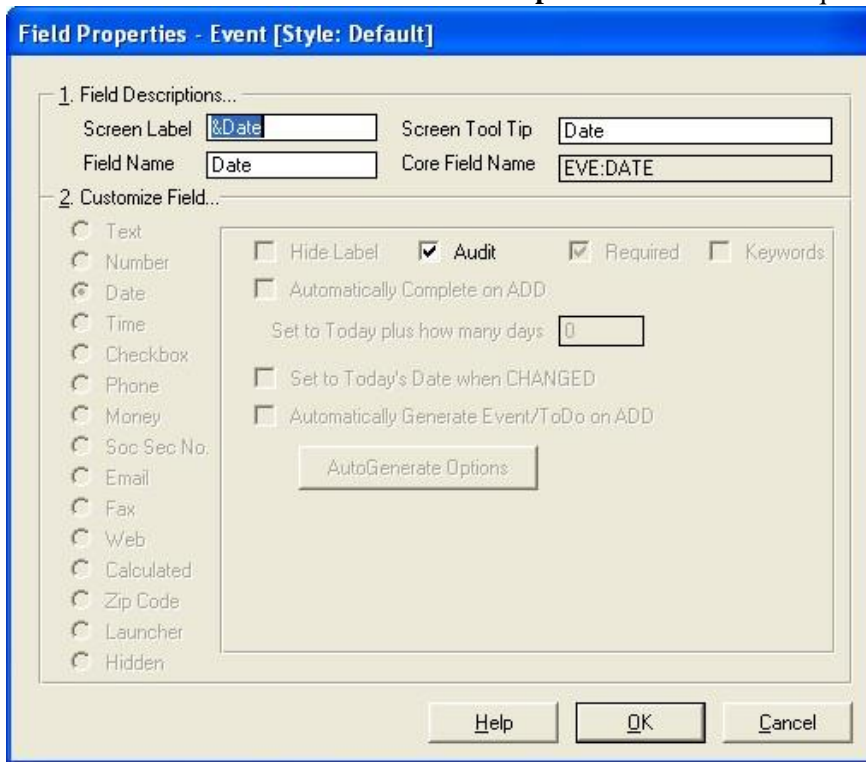
3. Right-click on the Date field.



4. Click: Customize Field



5. Insert & at the start of the Screen Label. **Important** - AP Follow requires this change.



6. Create the Follow Up field by right-clicking on, for example, User3. You may use another User field if User3 is already taken.

Note: If your Time Matters database has multiple Form Styles for a form, you should check each of these custom Form Styles to see that the User3 field, or other field you have chosen, is available for use in each of the custom Form Styles. You do not have to use the same User field in every form, but that is desirable.

7. Click on: Customize Field

8. Enter the Field Descriptions:

Screen Label: Follow &Up

Screen Tool Tip: Enter no. of days-Press button

Field Name: FollowUp

9. Choose: Launcher and enter the Prefix: C:\Programs\apfollow.exe

Note: C:\Programs is a new folder you create for the downloaded file, apfollow.exe

10. Here is how the Follow Up field will look:

Area 4

User1

User2

Follow Up

User4

User5

User6

Memo

11. Save & Close the Event Form Style

3.3. Customize the ToDo Form Style

Customizing the ToDo Form Style will allow you to quickly create a Follow Up ToDo based on an existing ToDo record. You will find this useful when you complete a task, but now need to wait on someone else to do something. A Follow Up record will remind you to check with them. Or you can use a Follow Up to remind yourself to do something related to a task you have just completed.

1. Select ToDo from the List of Form Styles

List of Form Styles

Event | **ToDo** | Contact | Matter | Custom | Notes | Docs | Phone | Email | Mail | Web | Billing | Outlines

| Description | Code | Additional Desc |
|-------------|------|-----------------|
| <DEFAULT> | | Default Style |
| Conference | CONF | Conference |

2. Double-click on the Default Style for ToDo

List of Form Styles

Event | **ToDo** | Contact | Matter | Custom | Notes | Docs | Phone | Email | Mail | Web | Billing | Outlines

| Description | Code | Additional Desc |
|-------------|------|-----------------|
| <DEFAULT> | | Default Style |

3. Right-click on the Date field

Date

Priority

Duration 0.00

Code

Description

Client

Reminders

Follow Done Notify Hide Trigger Review Billable Private Status

Area 2

Area 3

4. Select: Customize Field

5. Insert & at the front of the Screen Label

6. Right-click on the User3 field. You may use another User field if User3 is already taken.

The screenshot shows the 'ToDo Form Style' window with a menu bar (File, Edit, Help) and a toolbar (Save and Close, Close, Description). The form is divided into several sections:

- Primary:** Contains fields for Date, Priority, Duration (0.00), Code, Description, Staff, Client, and Reminders. There are also checkboxes for Follow, Done, Notify, Hide, Trigger, Review, Billable, Private, and Status.
- Area 2:** Contains fields for DueTo, Location, Address, Address 2, City, and Tel/Fax.
- Area 3:** Contains fields for Pri Contact, Firm, Address, Address 2, City, and Tel/Fax.
- Action Area:** Contains fields for Cur Status, Next Action, and User3.
- Delegation Area:** Contains fields for Deleg'd by and Return Date.
- Chgd/Done:** Contains fields for Chgd/Done.
- Memo:** A large text area at the bottom for notes.

7. Select: Customize Field

This screenshot shows a close-up of the 'Action Area' section from the previous window. A context menu is open over the 'User3' field, showing three options:

- Use Default Style
- Customize Field (highlighted by the mouse cursor)
- Customize Area

8. Enter the Field Descriptions:

Screen Label: Follow &Up

Screen Tool Tip: Enter no. of days-Press button

Field Name: FollowUp

Choose: Launcher and enter the Prefix: C:\Programs\apfollow.exe

9. Here is how the Follow Up field will look:

10. Save & Close the ToDo Form Style

3.4. Customize Other Dated Form Styles

You may add the Follow Up field to all other dated Forms that you use in Time Matters. We recommend you consider adding the field to these Dated Forms:

- Notes
- Docs
- Phone
- E-Mail
- Mail

There are other dated Forms, but it makes less sense to have Follow Up fields on them.

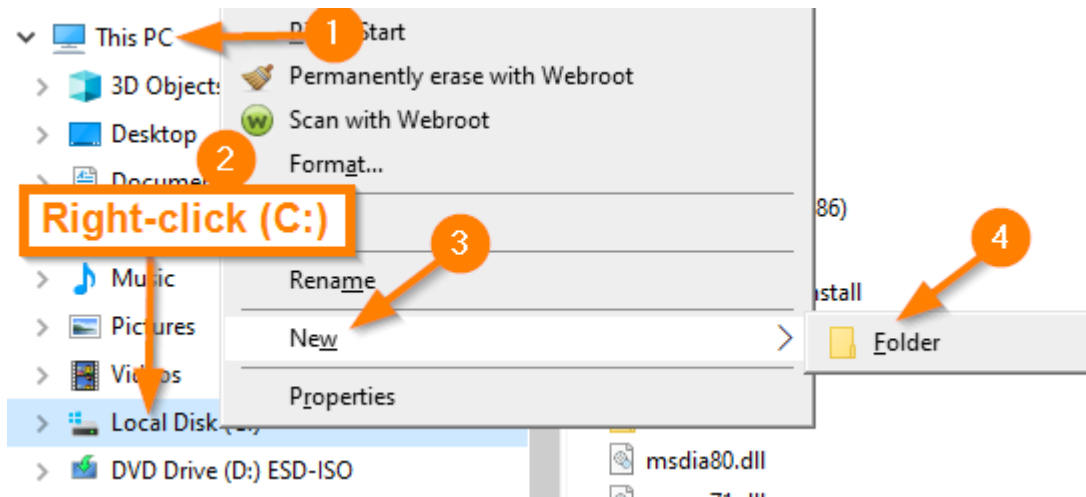
The steps for customizing these other forms are just like the steps for customizing the Event and ToDo Form Styles shown above. Be sure to customize the Date field in each Form Style so that the Screen Label has the entry, &Date.

3.5. Copy apfollow.exe to C:\Programs Folder

Open Windows File Explorer by:

- Clicking the yellow folder icon on your Windows Task bar, or
- Right-click on the Windows Start Button and click File Explorer

Create a new folder named **Programs** in the C drive.



Copy AP Follow program file, apfollow.exe, from you Downloads folder into C:\Programs folder.

Use copy and paste or drag-and-drop file copying to copy apfollow.exe into the new C:\Programs on your PC using Windows Explorer.

3.6. Test the Customizations

After customizing your Time Matters database and copying the apfollow.exe file to the new C:\Programs folder, you can test these customizations. Go to Section 2 of these instructions, How to Use the AP Follow System.

If nothing happens when you press the button for the Follow Up field, it means that there is a problem either with the Follow Up field customization or the location of the apfollow.exe program. The entry in the Prefix field of the customization window for the Follow Up field must exactly match the location of the apfollow.exe program.

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