



# Instructions

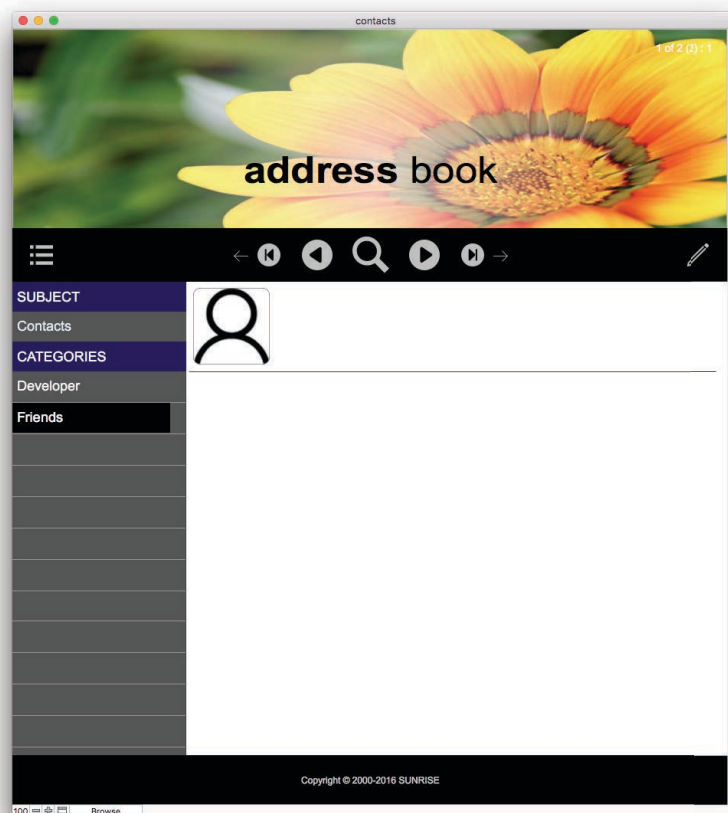
## Getting Started

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SUNRISE Contacts 2017<sup>1</sup> is your personal electronic organizer for managing just about every kind of visual and auditory information in existence. Built on Apple's highly acclaimed FileMaker Pro 16 platform, SUNRISE developers have created and designed this tool (used by various researchers) with your privacy in mind as well as provide the security your data deserves.

### How SUNRISE Contacts 2017 works

Lying at the heart of your organizer is the Contacts ([contacts.fmp12](#)) database.<sup>2</sup>



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<sup>1</sup> Latest version can be found at <http://www.sunrisepage.com/>.

<sup>2</sup> Opening SUNRISE Contacts 2017.app or SUNRISE Contacts 2017.exe will open [contacts.fmp12](#).

This is the place where you do all things relating to your contacts (i.e., a combination of individuals, organizations, or both). This means you can store and perform various tasks related to your contacts, including sending and receiving emails, creating and printing labels, preparing your calendar schedule of events and things to do, accessing the web, and even preparing invoices and orders for products you might sell to individuals. Also included are features to ensure information is clean and accurate and to save you considerable time in getting your information ready and accessible.

In the business world, a Contacts database is called a contacts relationship management (CRM) system. In the personal world, a Contacts database is called an “Address Book”.

### About Lookup databases

Also included with the Contacts database are various lookup databases. These are designed to expand the versatility and power of your Contacts database. They give you the opportunity to separate and focus exclusively on more specialized information relating to your work, hobby or other activities, or to help you organize and handle different situations with ease.

For example, you can store videos you have downloaded from the internet, cooking recipes you have collected, great photography shots you have taken, or play your music collection of mp3 files in a more flexible and simple way. Or why not have lookups for determining the postcode, country international codes, figuring out the correct suffix of a person’s name etc?

In the business world, the presence of lookup databases help to turn your CRM into a powerful master data management (MDM) solution. In the personal world, it simply means you have extra power at your fingertips.

### Where to find more lookup databases

For a range of available Lookup databases, check out the SUNRISE website at <http://www.sunrisepage.com/contacts/lookups.htm>, or suggest your own for us to build for you. Alternatively, if you have built your own Lookup databases, these can be added and accessed through the Contacts database

To add your own Lookup databases to the Contacts database:

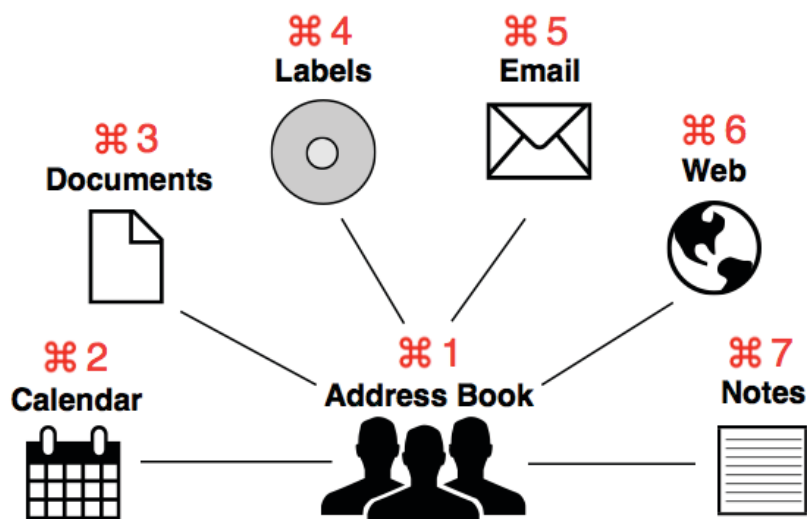
1. Choose “Access...” under the File menu (you must be logged into the database as the Owner).
2. Navigate to the Lookup databases layout.
3. Create a new record.
4. Add a picture to represent your lookup database and the filename to help you and other users identify the database. NOTE: To access additional fields, press the Option key and click the field name headers.
5. Add a brief description to help you and other users to understand the purpose and function of your Lookup database.

6. Go to your Lookup Databases layout page (press Command or Ctrl 8). You will see your Lookup database in the list, arranged in alphabetical order by database title.

To hide lookup databases, you can use the Account Names field to selectively choose the user accounts that can view selected lookup databases. The default is "All". Or enter the account name(s) on separate lines for greater control. Alternatively, if you go into the Preferences section (under the Help menu), there is a Lookups button in Layout Settings. Click it to disable access to the Lookups for Guest users, or All users.

### Access to the contact layouts

The best way to get to know all the essential layout groups in your Contacts database is to press Command (or Ctrl) followed by the number 0. This is your Menu.



From the menu, you can access the following layout groups:

#### **Command (Mac) or Ctrl (PC) 1: Address Book**

The Address Book is the place for all things relating to contact information, such as the names of individuals and organizations, email addresses, telephone numbers, etc.

#### **Command (Mac) or Ctrl (PC) 2: Calendar**

Create and organize calendar items (or tasks) by any category (e.g., memos, messages, to do, or even a project name for that matter) and subject (i.e. name of an individual managing the calendar items). Add tasks (or calendar items for each category. Add your own personal or corporate pictures and print a calendar booklet with shown to hang on a wall (or create a booklet), together with all calendar items clearly marked and color-coded by priority.

NOTE: If contacts.fmp12 is registered (this will open up the lookup databases), you can also turn on the Clock display in Preferences section and all upcoming calendar items will turn into events. Then you can receive

messages on the screen, or emailed to you (or whoever receives the calendar items) at the right times.

**Command (Mac) or Ctrl (PC) 3: *Documents***

This is the place to create and store unlimited individual and organization electronic documents of virtually any size and type (you may even include pictures, movies and sounds of all file types). We recommend documents are stored in a single location outside the database and create reference links in the database to the documents. However, if certain documents are important, also store a direct copy within the database. You can go both ways.

**Command (Mac) or Ctrl (PC) 4: *Labels***

Print your most common types of labels (most are for Avery paper), or suggest your own and we will incorporate it. Add your own graphic designs and add text to your labels for that professional touch. Information from your contacts can also be included.

**Command (Mac) or Ctrl (PC) 5: *Email***

Use this to create, send and receive emails.

NOTE: To send messages by email for calendar events, you will need to create an email account here.

**Command (Mac) or Ctrl (PC) 6: *Web***

Access the web browser for viewing URLs directly within the contacts database.

**Command (Mac) or Ctrl (PC) 7: *Notes***

Write notes. Unlimited subject and category ensures your notes will cover every conceivable situation.

**Command (Mac) or Ctrl (PC) 8: *Lookup Databases***

Access and open lookup databases.

**Only accessible from the Menu layout: *Finance***

The Finance layouts provide a means of organizing the products you sell, as well as handling the ordering process and preparing/printing invoices for your customers/clients.

**Only accessible from the Menu layout: *Personal***

The Personal layouts allow for more detailed information relating to the individual. You can keep a record of his/her interests, extra photos, noting details of pets (and even print pet posters if you have lost a pet), creating links to family members, storing physical details that might be relevant to your line of business (e.g., modeling) etc.

**About the buttons and menu commands**

Naturally, we have provided some buttons and useful menu commands to help you navigate through the records, layouts and fields, as well as perform other essential functions on the records or in the actual data fields. For faster access to the more useful menu commands and buttons,

try pressing certain key combinations. Don't know which keys to press? Clicking on the menus and checking against the menu commands will give you a clue.

## A useful design feature

This brings up another useful design feature of SUNRISE Contacts 2017. The type of buttons and menus you will see and their position will always be consistent in all the databases associated with this product. In other words, if the databases are made by SUNRISE, they will look the same and work in the same predictable and reliable way. This simple design consideration makes it easy for you and anyone using the databases to remember all the buttons and menus in all the databases. Feel free to try them out. The more you do, the easier it will be. And don't worry about making a mistake. Where there is a chance for you to make changes to the data in the records of your database, you will be given the opportunity to cancel from whatever function you intend to perform. All other buttons and menus that don't modify your data will perform in a safe and predictable manner.

## How to enter contacts

1. The first port-of-call will probably be your Contacts layout (also called the Address Book). You need this layout to, well, add contacts by name and any organization associated with the individual. However, you do have the power to organize individuals by any number of subjects and categories you require for quicker and easier finding of contact records. Furthermore, you can re-use a contact in another category. And, you can add more information about how to contact your "contacts" through telephone, email, web and other means. Want to store a picture? No problems if it helps to put a face to a name. Just drag and drop a picture in the picture holder field (you really can't miss it!). Also, if you ever need to delete a contact record in the Address Book, click the row and choose Delete record. The specific details relating to the individual and organization will be retained the next time you need to recreate the record. It is only when you go into the individual or organization ID layouts (in the List layouts) that any deleting of records will permanently remove all details related to the individual or organization throughout the database. However, in the Contacts layouts (the one with the category on the side), you can focus exclusively on creating the contacts (i.e., individuals and organizations) and linking them together. In fact, many other layouts are dependent on the availability of these contacts to work properly. So it is best to start from the Contacts layout and enter your contacts from there.
2. In the Contacts layout, choose New Record (if there isn't a record already created). This is to create a new subject for your contacts.
3. If you have created a new record, type a subject name. This is your overarching "first-level" category system to help you get a feel of the general nature of all your contacts you will store in that record. If you feel certain contacts are very different to the subject matter you

have created, just create another record and type the subject more suited to the contacts.

4. Next, you will probably want to create more specific categories under the subject name (very useful if you have heaps of contacts but need to find a way to quickly find one a more contacts in a specific sub-group (i.e., the category itself).
5. Before you create a new contacts record, it is a good idea to click on a category to “highlight” it. This will have the effect of turning the category field into a black box with white text. Now you are ready to create new contacts.
6. Edit Mode might be turned off. For people with tablets who could accidentally touch a field and enter into it, this is a useful safety feature to prevent data from being modified. If you want to edit data, click the pencil icon in the navigation bar (it is situated on the far right) until it turns red. You will enable Edit Mode. It is at this point that each time you enter a field, the Touch Keyboard will appear for tablet users. For laptop users, just type the text into the fields as usual.
7. With Edit Mode turned on, click on the simplified image of a person (basically two circles representing the individual’s head and body). A new contact record is created.
8. Click into “Individual Name” and/or “Organization Name” and type away. In the case of the Individual Name, you will be taken to a more detailed popover where you can break up the name into first name, middle name, last name, prefix (in that order, since most people like to type the first name initially and choose whether or not to include a prefix for those who need it for business purposes) etc. You can press the TAB key to exit the current field and enter the next field. Keep pressing TAB key to get through all the fields, including organization details. Press Shift TAB keys to reverse the direction when going back to a previous field.
9. Step 8 is useful if you are typing in a new individual and/or organization name for the first time. However, if the individual or organization already exists in the database, don’t bother about typing the full name again. A pop-up menu will show the names of all individuals or organizations stored in your database. All you have to do is choose the individual and organization you want.
10. To enter more contacts, scroll down to the last portal row (or press the Option key and click into the category for quick access to the last portal row). Repeat steps 7 to 10 for each contact you wish to store into the database.
11. When you are finished, turning off Edit Mode will automatically sort the rows of contacts by last name and protect the data from being accidentally modified. Then it becomes a simple matter of scrolling

to find a specific contact you wish to see, knowing the individual is arranged in alphabetical order.

12. Do you see a paperclip in the top right corner of the individual's photo? Click it a number of times until a specific type of information is displayed for all the contacts (e.g., telephone number, email address, postal address etc). This helps you to focus on the information that is important to you and give you quick access to this information.

## Documents archive and creation

The usefulness of your database increases with your Documents layout. All those pesky electronic files hanging around on your computer that are connected in some way to your contacts can be brought together quickly and efficiently. The file format doesn't matter. This database thrives on handling Excel, Word, PowerPoint, and PDF files, as well as movies, sounds, images and much more. All you have to do is throw the files into the container field and let the database make the association between the files and your contacts (individual or organization can be selected to make the link).

NOTE 1: For your Contacts database to store documents, you need to provide a category name and highlight the category just like in the Contacts layout

NOTE 2: As an additional feature, press the Option key as you click on a category. You will be shown the last portal record in the Documents portal window. Very useful if you need to quickly reach the next empty record portal for adding a new document. Press Option key as you click the documents icon. You will access the place to store a reference link to a document stored externally. Otherwise, don't press the Option key to store a copy of the document inside the database. For extra information about the nature of the document and/or how to print the document, enable Edit Mode and click the information icon that appears next to the document icon. Pressing the Option key as you click the icon gives access to how you wish the document to be printed. No Option key means you will access the general information about the document.

NOTE 3: The document title will automatically be entered on importing a file based on the file name. Or enter a document title first before importing the file. Whichever is more convenient.

NOTE 4: You can keep documents stored externally and make a link to the document within the database, or store the documents directly within the database. For the former, click the document icon, and choose the Stored Externally tab. Alternatively, press the Option key as you click the document icon. If you press Option key again and click an empty container field, you can select the document through the dialog box. Or else drag-and-drop the document file into the container field. A reference path will be stored in the database, but not the document itself. If you would like to store another copy safely within the database, choose the Stored in Database tab.



NOTE 5: Do you want to know where the linked document referenced by your database is located on your computer? Go into the Externally Stored tab. Do you see a document you want to find? Press Option and Shift keys together and click the document. The folder containing the document will open up.

NOTE 6: Keeping a reference path to a picture, audio, video or document file in a container field helps to keep the database compact in size. It is also the safest approach when managing large numbers of files and large file sizes. This is especially true in the event where your database file may get corrupted, which is possible under OS X if you should accidentally run out of storage space (since Apple still does not properly test its products). Then you will not be able to extract the documents in a corrupted database. However, in a database that references files externally, any corruption to the database will not affect the files. And anyway, it will take more than 100 million reference links in your database to make it too big and increase the risk of running out of space on your storage device, which is unlikely you will ever exceed. Beyond that, when you do keep a reference path, remember to keep the file in the same location and don't move it. Certainly you should not trash it. You need the file to be located where it is for the database to retain a link to the file. So before storing the reference path in your database, decide on a secure and reliable place to archive all the documents and use the database to create the reference paths to this location.

## Entering notes

The Notes layout provides another level of flexibility. Enter large slabs of text for the individual or any topic, organized under any subject matter and categories you want. You have the flexibility to decide how you want the notes to work for you. Perhaps you want to use them as an electronic diary to store text for any day. Or maybe you only need to store general notes relevant to your work. Whatever the case, you control what happens to the notes for your line of work, or personal activity.

NOTE 1: You can encrypt notes for that added level of security. If you do encrypt your notes, remember that all text styling (e.g., bold, italics, color etc) will be lost.

NOTE 2: Pictures can be added to notes in the notes list layout.

## More about categories

Have you noticed how much we have used subjects and categories in various layouts? There is a good reason for this. Categories (and subjects) are a powerful way of organizing and quickly finding information at the press of a category. As you have noticed, categories appear as a column of grey with white-border text boxes on the left side. Initially these may look a bit complicated, but they really are not. Imagine these boxes are like the pigeon holes you find in a post office. Instead of throwing in a parcel or envelope into a box, you will be throwing in a word or words into one or more of these boxes. When you enter word(s) into a box, you are effectively categorizing the record(s) under a broad term that best



describes or summarizes the nature of your record(s). By clicking on this word or words in the category, all related records are found and shown quickly to the right of the layout. It is basically like doing a search or record find, except you don't have to remember the specific word or words to find those records. They are already there in the category system. Just click the box containing the category word or words and the search for the records is done instantly. Easy.

To give an example of the benefits of having a category system in place, you may decide to store the names of your sister, brother, uncle, aunt, father or mother or anyone in your family and how to contact them (telephone number etc.). But how do you grab all these records at once? Maybe you would like to send them all a Christmas card or letter but don't want to be finding each record one-by-one to grab the relevant details? Well, just create a category called "family" into one of the boxes and click on the category to highlight it. All the records relating to "family" get picked out and grouped together as portal records which you can scroll down to see everyone and their details.

To create a category, click into an empty category box (the first empty box is usually your best bet) and type away. Repeat for each new category.

#### TIP

If you create multiple category words and put a number or letter at the front of the category word, you can also give a sense of hierarchy to your groups of contacts. Categories are sorted in alphabetical order. So, it is possible to have the broadest descriptions at the top to the more specific toward the bottom. In that way, you can narrow down the range of records you need to find quickly.

### Creating priority records

To specify the priority level for your record, click the Record Number. It will change color. Red is generally classified as high priority, orange is important, and green is low priority.

Prioritizing a record in the above manner is similar to another feature called "Marking Records" (available under the Records menu), except prioritizing a record is designed to help you give a sense of hierarchy in the level of importance of your records through the three different colors. If prioritizing a record is not important but you need to highlight the record, use the Marking feature and choose Show in the Mark menu command to gather and present those marked records.

### Finding records

Finding records is undoubtedly a crucial part of any database system. *SUNRISE Contacts 2017* is no exception. When finding records, all you do is click the Find button (also available under the Records menu). The Find button is the largest button sitting in the middle of your navigation buttons. It shows a simplified image of a magnifying glass as a clue to its function.

Next, type in some characters or word(s) in any or all of the fields in the

layout. To refine the search further, it is possible another layout may have the field you want. To access this field, use the layout navigation buttons to help you move to another layout while in Find mode.

When you have finished with typing, press the Enter (or Return) key. The database will find all the records matching what you have typed in the fields.

NOTE: You can choose *Add New Request* under the *Requests* menu to create multiple find requests to run simultaneously under the same general search. For more sophisticated searching, you may want to use the following in your fields (available under the Insert menu during Find mode):

*For date or time fields*

/ /      today's date

?      invalid date or time

*For any field*

=      exact match

" "      literal text

\*      zero or more characters

@      one character

@\*      at least one character

!      duplicates

...      range

= =      field content match

*For number fields*

<      less than

>      greater than

>=      greater than or equal to

<=      less than or equal to

## Automatic postcode lookup facility

Allergic to lots of typing? Who isn't? Fortunately SUNRISE Contacts 2017 understand your concerns.

For example, entering an organization name and all its associated contact details, notes, pictures, documents and so on and having it related (or linked) to an individual means you will never have to re-type all the details again. Just type the individual name, and select the organization ID number (the name will also be shown next to the number for ease of identification). All other information linked to the organization such as telephone numbers will already be shown, saving you time in having to re-type it.

And, if you have selected auto enter for the email address of the individual in the Preferences layout based on a specified format and known web address of the organization, this can be automatically typed for you as well.

It is all about saving you time and reducing bad data creeping into your records due to bad data entry errors. It can happen to anyone. We are all human. However, you definitely have no excuse with SUNRISE Contacts 2017. This tool will reduce data entry errors and gets faster in adding more contacts.

We continue this “auto entering of data to save you time” feature by providing you with a powerful postcode lookup tool. No more having to figure out the postcode of a suburb or town, painful as can be on various occasions. Just enter the suburb (or city) followed by the state in the Address fields, and you will discover that the postcode will automatically be displayed (assuming you have entered the city and state correctly). If the postcode is not correct, click on the Postcode field. It will search for other available postcodes for the same city and state (or you can edit the postcode.fmp12 lookup database to add new postcode records or update existing ones). And if you want your database to do automatic postcode lookup in another country, specify the country in the Country field. Available postcodes include Australia, United States, United Kingdom and Spain, to name a few.

Finally, to ensure you enter data cleanly and with reduced errors, the database will eliminate those pesky double space characters, and extra carriage return characters where they are not needed (e.g., the first and last names).

Want more? When it comes to notes, email messages and calendar item text fields, you can specify the type of text cleaning and conversions you want performed automatically by the Contacts database (usually activated on exiting the field). Go into Preferences section under the Help menu, click the Text Cleaner tab, and put an X into the check boxes for the type of cleaning and conversion capabilities you want the Contacts database to perform.

Now that’s easy!

## Sorting records

Another useful feature of any database system (SUNRISE Contacts 2017 is

no exception) is the ability to sort records simply by clicking into the field you want to sort by and choosing *Sort Records* under the *Records* menu. Furthermore, you don't have to repeat the whole process of sorting records using the same field. By choosing *Sort Records* again, you can repeat the last sort function.

Needless to say, if you want to unsort your records, choose Unsort in the Records menu.

NOTE: In list layouts (where the records are shown in a compact spreadsheet-like way), you can sort fields by clicking on the field title (or header) name at the top of each column. As an additional feature, some list layouts can display different fields. To see these fields, press the Option key and click on the field title name.

### Navigating records, layouts and fields

SUNRISE Contacts 2017 will sometimes provide multi-functional navigation buttons to help you navigate across not just records, but also calendar dates (remember to press the Option key when clicking the buttons in the calendar layout). In the layout navigation buttons, press the Option key as you click on the buttons to take you to the first or last layout in the group. Press Ctrl and Option keys while clicking to take you to another layout group.

NOTE: For iPad, iPhone and Android users, use the three-finger tap on the navigation header region to take you to the Menu layout. From there you can access any layout group, whether it be the Address Book, Notes, Calendar or anything else.

To switch between List (for a big picture look at many records as a means of detecting large-scale trends in all your data or to find specific data more quickly by scanning groups of records at once) and Form (for a more focused and detailed look at a specific record) design layouts, click the button on the far left of the Navigation buttons. Or press the same key combination for the layout group a second time to enter the List layouts, and vice versa.

### Account names

SUNRISE Contacts comes with pre-defined account names. These are:

Account 1 (Default login)

Username: Owner

Password: owner

Account 2

Username: Admin

Password: admin

Account 3

Username: FileMaker Guest

Password: guest

Account 4 (External Guests)

Username: [User's PC login name]

Password: [User's PC login password]

Except for Account 4, all other accounts can have their passwords changed for greater security. And the further down the account names list you go, the greater the restrictions in what you can do with the contacts and lookup databases.

### Anything else?

You can be sure to find numerous other features and layouts when exploring SUNRISE Contacts 2017. All should be fairly straightforward to use. Try them out and see how they can make your life easier in getting things done.

Enjoy!