



Instructions

Getting Started

SUNRISE Contacts 2023¹ is an effective and powerful information organizer for managing just about every kind of visual and auditory information in existence. Built on Apple's powerful FileMaker Pro 17-19 platforms, SUNRISE developers have created a unique electronic organizer that anyone can use.

How SUNRISE Contacts 2023 works

Lying at the heart of your organizer is the Contacts ([contacts.fmp12](#)) database.² Use it to manage all things relating to your contacts, including emailing, calendar, documents etc.

A contact comprises of an individual, an organization, or a combination of the two (as people can be part of an organization) that you need to regularly keep in touch or have access to at your fingers (or can be quickly found as need be).

Menu

When linking contacts with other information, the main layout groups available to you are as follows:

Command (Mac) or Ctrl (PC) 1: *What's On*

A summary of all calendar items. Most recent items shown at the top.

Command (Mac) or Ctrl (PC) 2: *Contacts*

Contacts and their contact details, such as email addresses and telephone numbers, are kept here.

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

Create and organize calendar items (or tasks, can also be called events for tasks carried out in the future) by category.

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

Store unlimited documents, whether they are Word documents, movies or sounds, and associate them with contacts.

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

² Opening SUNRISE Contacts 2023.app or SUNRISE Contacts 2023.exe will open contacts.fmp12.

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

Create, send (and receive using CNS SMTPit Pro) emails.

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

Print common 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.

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

Built in web viewer/browser to store and view URLs. You can also store username and encrypted passwords for login web pages.

Command (Mac) or Ctrl (PC) 8: *Notes*

Write notes, ideas, diary entries, a list of products for comparison, or whatever you like.

Command (Mac) or Ctrl (PC) 9: *Add-on/Lookup Databases*

Access to add-on (or lookup) databases designed to expand the capabilities of the contacts organizer.

Only accessible from the Menu layout: *Personal*

Store more personal information about your contacts.

NOTE: Not every layout group (e.g., contacts, calendar, email, notes etc.) is restricted to one layout. As there could be additional layouts within each group, press Option Command (or Option Ctrl for PC users) and press the left or right arrow key. If there are extra layouts in the group, you will be taken to other layouts. This database will remember your last layout choice when you press the key combination or icon for that group should you wish to re-visit.

About Add-Ons

Add-on databases are designed to expand the versatility and power of your Contacts database by helping you to separate and focus exclusively on more specialized information relating to your work, hobby or other activities. They also provide additional information that can help in the contacts database, such as determining postcodes of contact addresses, or find a particular country code.

To learn about the available add-ons you have and the additional add-ons you can download, check out the SUNRISE website at <http://www.sunrisepage.com/contacts/add-ons.htm>. You can even suggest your own for us to build, or you can add your own databases to form a more unified database solution and so link them to the contacts database. You can do this through the Contacts database as follows:

1. Go under the "Access..." submenu in the File menu (you must be logged into the database as the Owner to see this).
2. Select Add-Ons. Add-On Access layout.
3. Create a new record.
4. Add a picture to represent your add-on database.
5. Enter the filename to help you and other users identify the database.

6. Add a brief description to help you and other users to understand the nature of the Add-On database.
7. Set controls on who can access the add-on database in the account names field. If you want users of any account to access the lookup database, type the word *All*. If you want to hide or restrict access to the add-on database from users logged into a particular account name, replace *All* with the account names that you do want to allow access, or leave it blank for no access. To know all the account names in the current database, visit File→Manage→Accounts.
8. Close the Access window.
9. Go to the Add-On Databases layout page (press Command or Ctrl 9). You will see your Add-On database in the list, arranged in alphabetical order by database title. Click the Add-On database to open it.

Subjects and Categories

Have you noticed the judicious use of subjects and categories in certain layouts? That is not a fluke. They are there to help you quickly organize and find records. The 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) on the right side under a broad term that best describes or summarizes the nature of your record(s). Then, by clicking on a category, all related records are immediately found and shown 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 a category system, 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.

The process of creating a category is fairly easy. Just 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 categories as 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.

Creating priority records

To specify the priority level for your record, click the Record Number. It will change color (following the way traffic lights appear). Red is generally classified as high priority, orange is important, and green is low priority. We also have a grey color for no priority, or just simply “not too important or urgent”.

We could have chosen a variety of different priority approaches to SUNRISE Contacts, and indeed there are a plethora of prioritisation systems out there to choose from.

For example, Apple has within its own contacts.app a means of highlighting records in a variety of different colors. Flexible? Yes. But do you need so many different colors? It depends on what makes sense to you and based on your understanding of what the colors mean. Sometimes some of the obscure colors you may use can help you to see the relationship between a variety of different items and the project to which they relate. But how do you know what’s important? And can you really handle a large number of hierarchical priorities when compared to the simpler and standard traffic light colours (i.e., red, orange and green)?

Then, of course, there is also the Eisenhower Matrix. Here the colors can be anything, but what is more important is that all items can be prioritized into four main areas:

1. Important and urgent.
2. Important but not urgent.
3. Unimportant but urgent.
4. Unimportant and not urgent.

As the name implies, it has helped one U.S. President to organize his daily activities well enough to get through his work and personal life. And he even had a saying based on his experiences about the things he had to do in the White House:

“What is important is seldom urgent, and what is urgent is seldom important.”

Who knows? Maybe his approach might work for you.

In SUNRISE Contacts, we have taken the simplest approach as used by more than 90 per cent of the population and is the easiest to understand. We use a combination of the traffic lights for the colors to set the level of priority and follow a similar approach to the Eisenhower Matrix. So, if you like, imagine red as step 1 in the matrix, orange is step 2, green for step 3, and grey can be step 4. But then again, you may decide to switch steps 2 and 3 around in the colors. In other words, all the urgent stuff is in red and orange, and the not so urgent in green and grey. Whatever makes total sense for you. You decide, and remember to stick to your choice of prioritizing things.

Speaking of prioritizing a record, this is similar to another feature included with SUNRISE Contacts called “Marking Records” (available under the Records menu). The difference is that 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, whereas marking records give no such hierarchy to your records (it just marks them). 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. Marking records is particularly useful if you need to select contacts or other records that have no obvious link or relationship between them. You just need to find a number of records and bring them together (perhaps to create a new category to group them because you can see a link, or perhaps it is for a one-off event, such as printing a letter and sending it off to all the contacts you have marked and that’s it).

Finding records

Finding records is undoubtedly a crucial part of any database system. Indeed, what’s a database without a search feature? Just another electronic paper weight. Fortunately, *SUNRISE Contacts 2023* does have such a feature. 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. Basically when you do this (i.e., adding new requests is the same as creating a new find record), it is like telling SUNRISE Contacts to use the OR function. Whatever criteria you have typed in a field in one record and another in a second record during find mode will find records satisfying one or the other criteria. If you stay in one record and type a search criteria in different fields, you are effectively saying to SUNRISE Contacts to find records that must satisfy one criteria AND the next criteria AND the next. If you need 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
- =*[*search text*]* Finds [*search text*] in any position

For number fields

- < less than
- > greater than
- >= greater than or equal to
- <= less than or equal to

Sorting records

Another useful feature of any database system 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.

Account names

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

Account 1 (Default login) Username: Owner	Account 2 Username: Admin
--	------------------------------

Password: owner	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 add-on databases.

Also note that the databases of SUNRISE Contacts are designed to auto-login to the Owner account. For the protection of your data, we strongly recommend that you choose File→Change Password to change the password. Use File→Manage→Re-Login to login to another account (i.e., Admin or FileMaker Guest) and change the password for those accounts (if you have direct access to the databases). You can also change the password through File→Accounts and select the account name and press the Reset Password. Then you must re-login to the account to change the password.

Unlock more features

What we have mentioned so far is just the tip of the iceberg. Many features have been added that may be free or, with a license key you can purchase, unlock for your personal or business use, as well as give you access to the add-on databases you may need.

To enter the license key:

1. Go into the Add-On databases layout in contacts.fmp12.
2. Click on the X in one of the standard lookup databases (e.g., finance.fmp12).
3. Enter your name and license key.
4. Click the Activate button.
5. Switch to another layout and return to the lookup database layout. Add-On databases registered with the license key will show up with an arrow button to let you know the databases can be opened. Click on the arrow button to open the databases.

Anything else?

You can be sure to find numerous other features and layouts when exploring SUNRISE Contacts 2023. All should be fairly straightforward to use. Try them out and see how they can make your life easier in getting things done.

Enjoy!