



# Instructions

## Emails

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### Sending emails

To send emails from SUNRISE Contacts 2017:

1. Choose Email under the SUNRISE Contacts 2017 menu. Alternatively, try Command (Mac) or Option (PC) 5.
2. If you have established an email account and password for the current record shown in the Email layout, a dialog box will appear. Enter the password for accessing your email messages (and ultimately your online account unless you have not yet verified the password online). If you haven't entered a password before and this is the first, click the Cancel button. You will enter the Account and Setup layout.
3. If no email account and password has been established and there is someone else's name in the record showing up under the Subject category system, choose New Record.
4. In Subject, select your name.
5. Not critical, but highly recommended, is to create the categories for storing and accessing your email messages. The default categories used by the Contacts database are Delete, Draft, Inbox, Sent, Spam, Error and Outbox. Perhaps in a future update of SUNRISE Contacts 2017, Outbox and Sent will be seen as one category and anything going to the Outbox is automatically sent. But for now, and as an added safety feature, anything placed in the Outbox will not be automatically sent. You will have to do it manually.
6. Your next step is to create a new email account and password (if you have not done so already). The email account name is usually your email address as provided by your ISP, and similarly for the username (which is often the same as your email address). Unfortunately, the password is something you have to supply (and remember). So, if you have no email account with any ISP, you can still access your own email messages. You just have to enter a new password of your choice and the Contacts database will remember it for you. But as soon as you go online to access

messages stored by your ISP on your email account, you must type a new password when prompted and the Contacts database will verify the information. If successful, the new password will replace the old (unless you have specified in the setup page for this not to happen, which is an added level of security).

7. Now the hardest part of all of this is typing in the incoming and outgoing settings needed by your ISP to deliver your email messages. To know what to enter here, your ISP will provide you with all the information you require. But to save time, the Contacts database will automatically type in suggested settings if your email account is with Yahoo, Hotmail/Outlook or Gmail (or Google Mail). With a bit of luck, all the information will be provided and you can immediately begin receiving and sending emails.
8. Make sure the receiving and sending application is selected in the incoming and outgoing settings. This is the minimum settings you must enter. Where the email receiving and sending application is external to the Contacts database, enter the incoming and receiving settings in the Preferences page of that external application.
9. Click the Login button and enter your password. You will have access to your email messages as well as perform tasks on them.
10. To compose your email, click the Draft category. Type the subject and message in the Body section. Your email account address and name will automatically appear in the From section of your email message. Select an email address from the pop-up list shown for the To section, and a name (if need be). Add any file attachments (if required). When finished, choose Send under the Messages menu. Your email will be held in the Outbox but not sent. Go into the Outbox and choose Send again to actually send the email message. Or change the category for the message to Draft and click the Draft category on the left to re-edit the message if necessary.
11. Once the email has been sent to your email sending application and eventually has reached your ISP for processing, the email message will appear in the Sent category.

## SPECIAL FEATURE

You have the ability to store and retrieve email message templates. Use the + and – buttons to add or delete these templates. Use templates as a way to save time re-typing certain email messages. Press the Option key while clicking the + button to retrieve more information, such as the email address you sent the template to.

## Receiving method

1. You can immediately receive emails by choosing Receive under the Messages menu.
2. You should automatically be taken to the Inbox. New messages will appear as unread messages by the way the time and date fields are **bolded**. Click the Read button to change the unread status of the message.
3. Decide if you wish to store the messages in another category or delete them by selecting the appropriate category in the pop-up list for each of the messages.

## Spam filtering

A natural source of annoyance for many users is the constant stream of spam received. Fortunately, the Contacts database can keep a record of special data tags (or patterns) to help identify potential spam messages and prevent the downloading of attachments (to save on your bandwidth). Go into the List layout of the *Email* section, and navigate to the *Email Spam Rules* layout. From there, specify where the database should look to find the data tag (it could be in the Subject section of the message, or the body of the message itself), and enter the data tag in the field called *Message is spam when it contains*.

This feature will store millions of spam rules. In fact, an unlimited number of rules can be stored in this database. Use it as a cost-effective and efficient way to clean up your emails and help focus on the really important messages.