



Linking ClickFax to MS Access and ODBC Databases

You will need version 1.5 or higher to do this. Please first check for updates. In ClickFax, go to File > Check For Program Updates. Install anything it alerts you to.

OPTION ONE: CREATING A NEW ACCESS DATABASE

Then, follow these instructions:

1. Go to the directory in which you installed ClickFax. Most likely:
c:\program files\datafab\clickfax pro\
2. In there will be a file called "cfpcontacts.mdb". Open it in Access.
3. Go to the table called "contacts" and open it. You can select and delete the first (sample) record if you wish.
4. Copy and paste each column of your excel sheet into its appropriate column in Access. You only NEED to have a fax number, everything else is optional.
5. Close out of Access.
6. Open ClickFax and go to Edit > Link Settings
7. Choose "Microsoft Access" (at the very bottom of the list)
8. Find this same Access file once more, and select it.
9. You will now have a tab called "Access Contacts"



OPTION TWO: LINKING TO AN EXISTING ACCESS OR ODBC DATABASE

To build a link to an existing Access database follow these instructions.

NOTE: These instructions will also allow you to build a link to any ODBC database. To do this, first build a linked table to the table in your ODBC database which holds the contacts you wish to link to ClickFax.

1. Start a new query in Access and call it "contacts." (the query MUST be called "contacts".)
2. Link the query to your table (or linked table, or another query)
3. map your fields to the following new fields in the query, make sure you name them (in the query) as listed below.

fax

REQUIRED

fax number (always include the area code even if local; use 011 prefix for international numbers)

email

email address (either fax number or email address is required. if you are only going to email, and not fax, then email is required and fax is not)

contid

unique contact record identifier (not required but a good idea)

contact

contact's full name (note: the contact field and the first and last fields are available for your use in mail merges and on the cover page. the reason we have a contact field with the full name AND first/last fields with only the first and last names is for your convenience.)

first

contact first name (optional, see "contact")

last

contact last name (optional, see "contact")

title

job title (optional)

company



company name (optional)

address1

first line of address (optional)

address2

second line of address (optional)

city

city of address (optional)

state

state of address (optional)

zip

zip code or postal code of address (optional)

country

country of address (optional)

phone

phone number of contact (optional)

4 Close out of Access.

5 Open ClickFax and go to Edit > Link Settings

6 Choose "Microsoft Access" (at the very bottom of the list)

7 Find this same Access file once more, and select it.

8 You will now have a tab called "Access Contacts"