



## Linking ClickFax to MS Excel

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: USING THE SAMPLE EXCEL FILE

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.xls". Open it in Excel.
3. You will see our sample worksheet called "contacts". You can select and delete the first (sample) row if you wish. DO NOT delete the first row of column names!
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. Make sure you keep the first row of column names intact! Even if you're not using a certain column, keep them in the same order, and keep the column title there!
6. Close out of Excel.
7. Open ClickFax and go to Edit > Link Settings
8. Choose "Microsoft Excel" (near the very bottom of the list)
9. Find this same Excel file once more, and select it.
10. You will now have a tab called "Excel Contacts"



## OPTION TWO: USING YOUR EXISTING EXCEL FILE OR CREATING A NEW EXCEL FILE

Please note that the above example uses our sample Excel sheet. As long as your sheet is formatted exactly like the sample, you can feel free to adjust your existing sheet to conform to ours. Please make sure the following requirements are met:

1. Your data is one worksheet/page and this worksheet is called "contacts." It cannot be called anything else (like the default, "Sheet 1", etc.). (See the sample for an example.)
2. You can have multiple pages and worksheets, but all others will be ignored. It will not break anything, however.
3. Your "contacts" worksheet must have the following columns- and only the following columns- in this order. (See the sample for an example.)
4. The data in these columns is mostly optional. For example, if you do not wish to include a phone number, you must still have its column in the sheet, with the label on the top. All rows under the first heading row can be blank.

*Column A:*

**contid**

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

*Column B:*

**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.)

*Column C:*

**first**

contact first name (optional, see "contact")

*Column D:*

**last**

contact last name (optional, see "contact")

*Column E:*

**title**

job title (optional)



*Column F:*

**company**

company name (optional)

*Column G:*

**address1**

first line of address (optional)

*Column H:*

**address2**

second line of address (optional)

*Column I:*

**city**

city of address (optional)

*Column J:*

**state**

state of address (optional)

*Column K:*

**zip**

zip code or postal code of address (optional)

*Column L:*

**country**

country of address (optional)

*Column M:*

**phone**

phone number of contact (optional)

*Column N:*

**fax**

REQUIRED

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

*Column O:*

**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)