Client Care Desktop

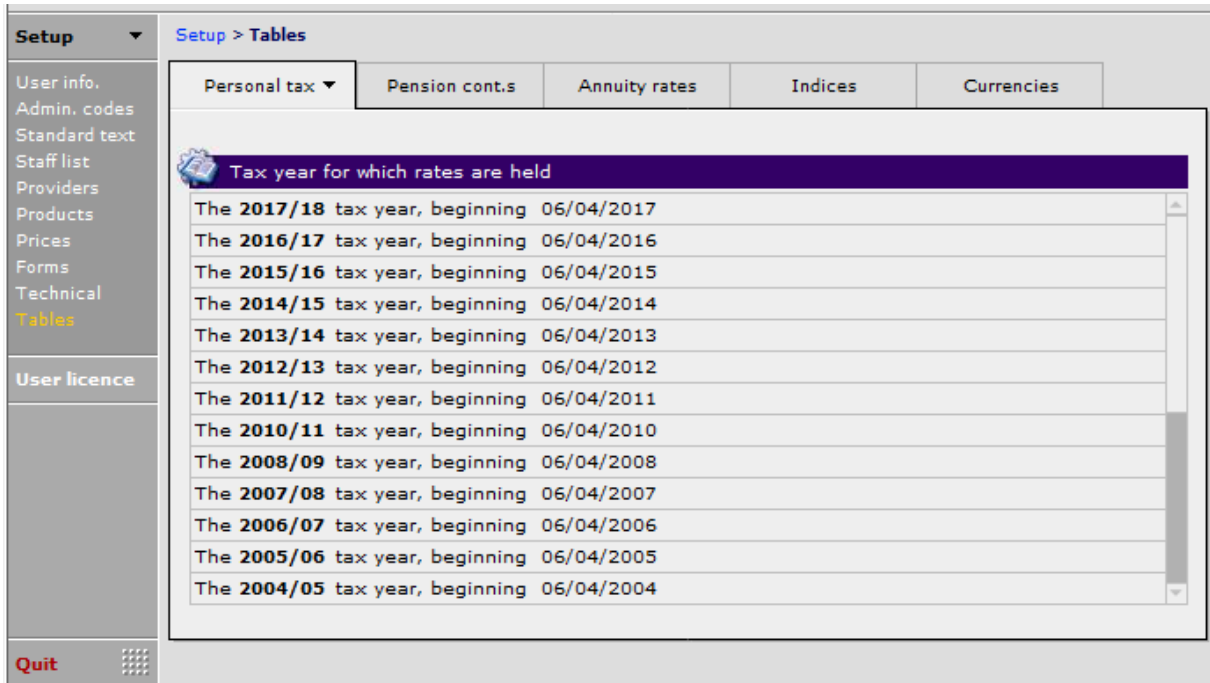## Importing the 2018/19 Tax Table (CCD Version 4.x)
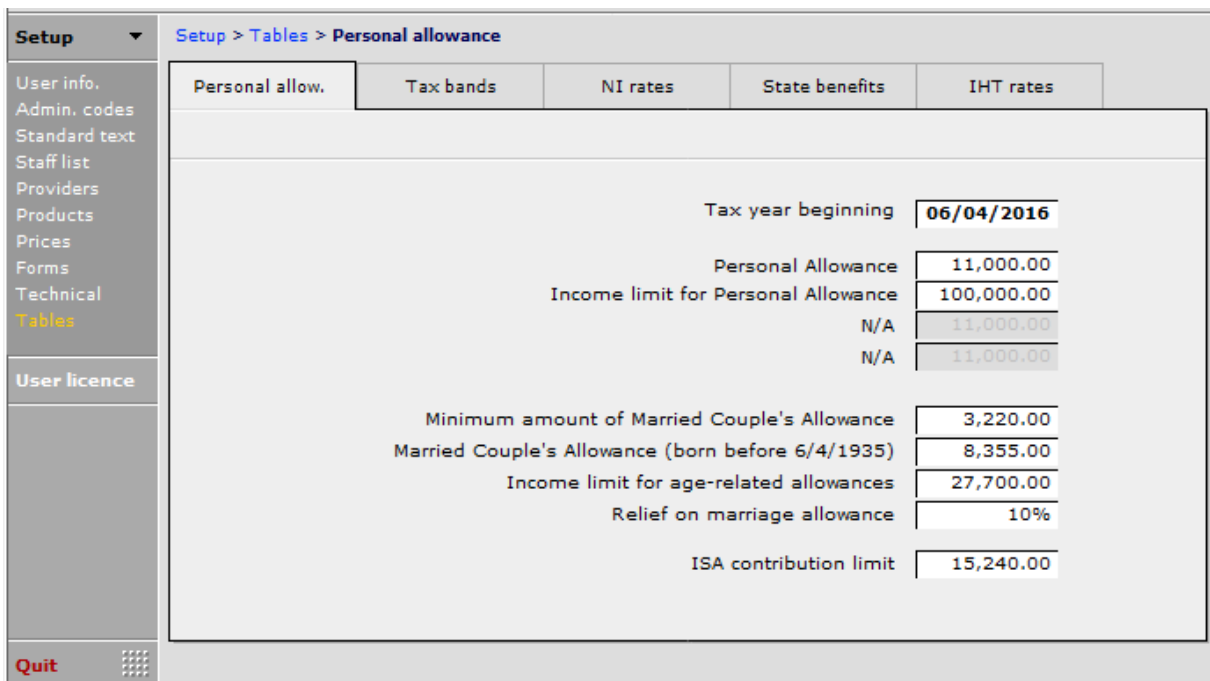
The first step in adding the 2018 tax record to Client Care Desktop (CCD) is to save the excel spreadsheet 'Tax Tables_2018_2019' to your desktop as you will need to import this file into your system.
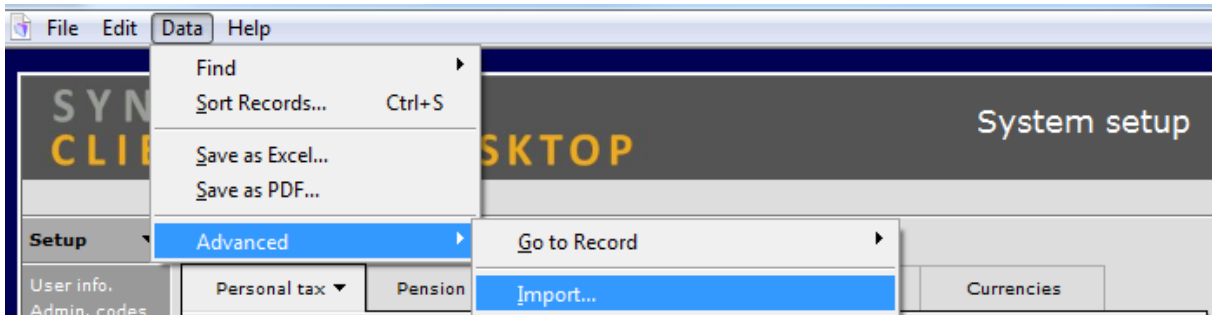
To import the 2018/19 tax record into CCD, navigate to *Setup > Tables*:

Click on any tax table in the list, you will see the following screen:

From the top menu click on **Data > Advanced > Import**, and navigate to the excel spreadsheet you previously saved on the desktop, select and click **Open**.
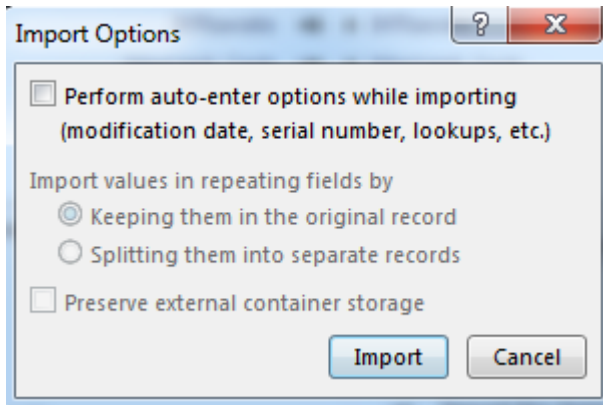

The Target should show **Current Table ('Tables')**.

Select **Add new records** then tick **Don't import first record** and **Arrange by: matching names**, which should display the same fields listed in both the Source fields and the Target Fields in the same order.
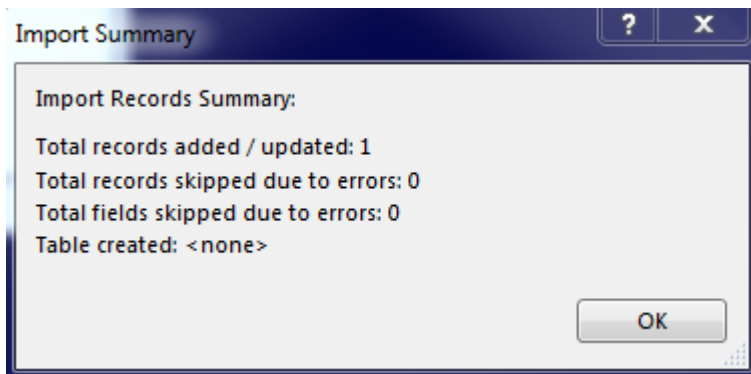
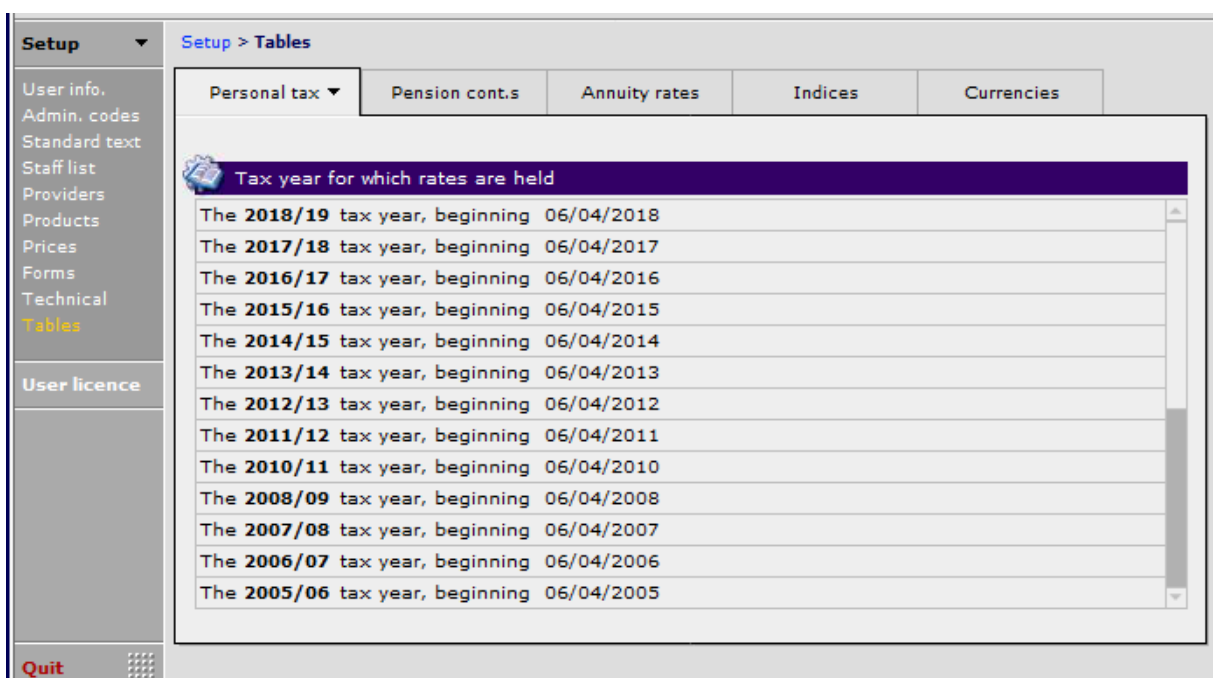Once everything is set as highlighted below, click **Import**:
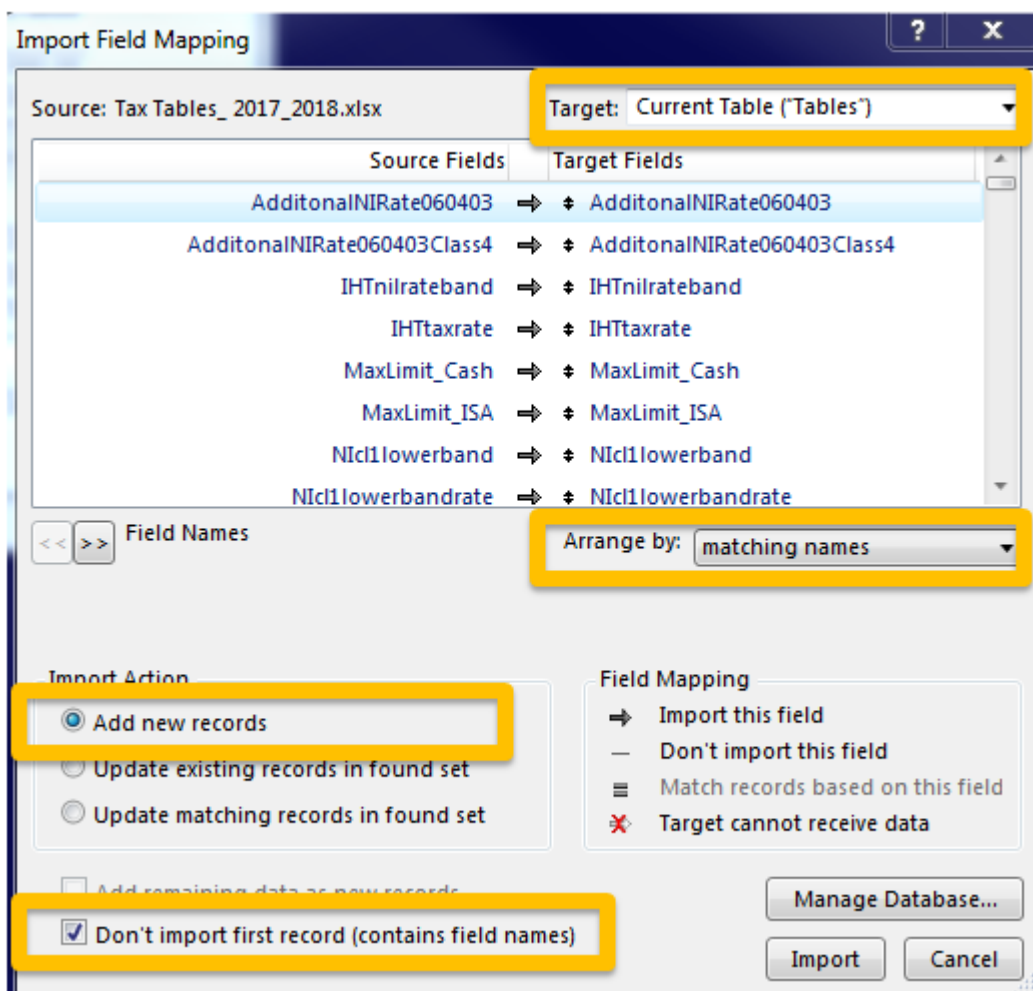
Leave **Perform auto-enter options** unticked and click **Import**.

Your new 2018 tax record will now be imported into the CCD system and you will see an Import Summary screen confirming this. Click **OK**:

The tax tables will now be available for 2018/19:

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