

Client Care Desktop

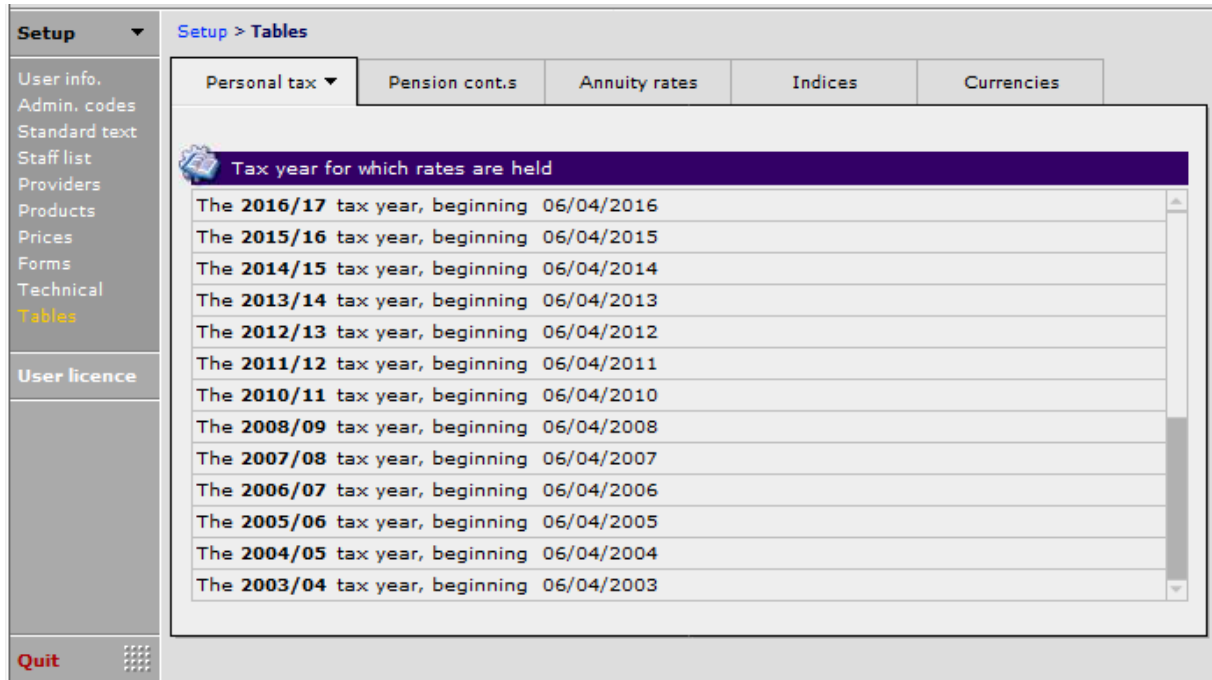
**Importing the 2017/18 Tax Table
(CCD Version 3.x)**



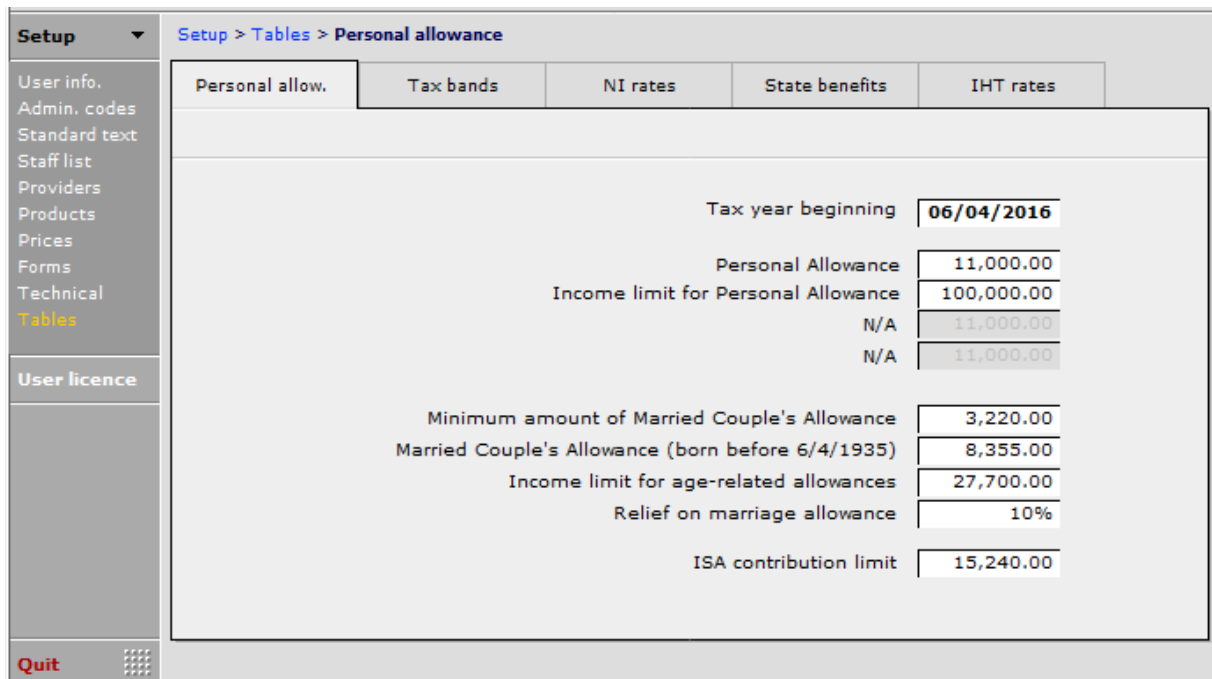
**SYNAPTIC
CLIENT CARE**

The first step in adding the 2017 tax record to Client Care Desktop (CCD) is to save the excel spreadsheet 'Tax Tables_2017_2018' to your desktop as you will need to import this file into your system.

To import the 2017/18 tax record into CCD, navigate to **Setup > Tables:**

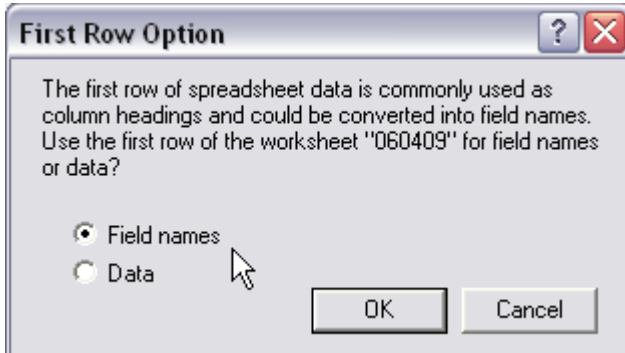


Click on any tax table in the list, you will see the following screen:



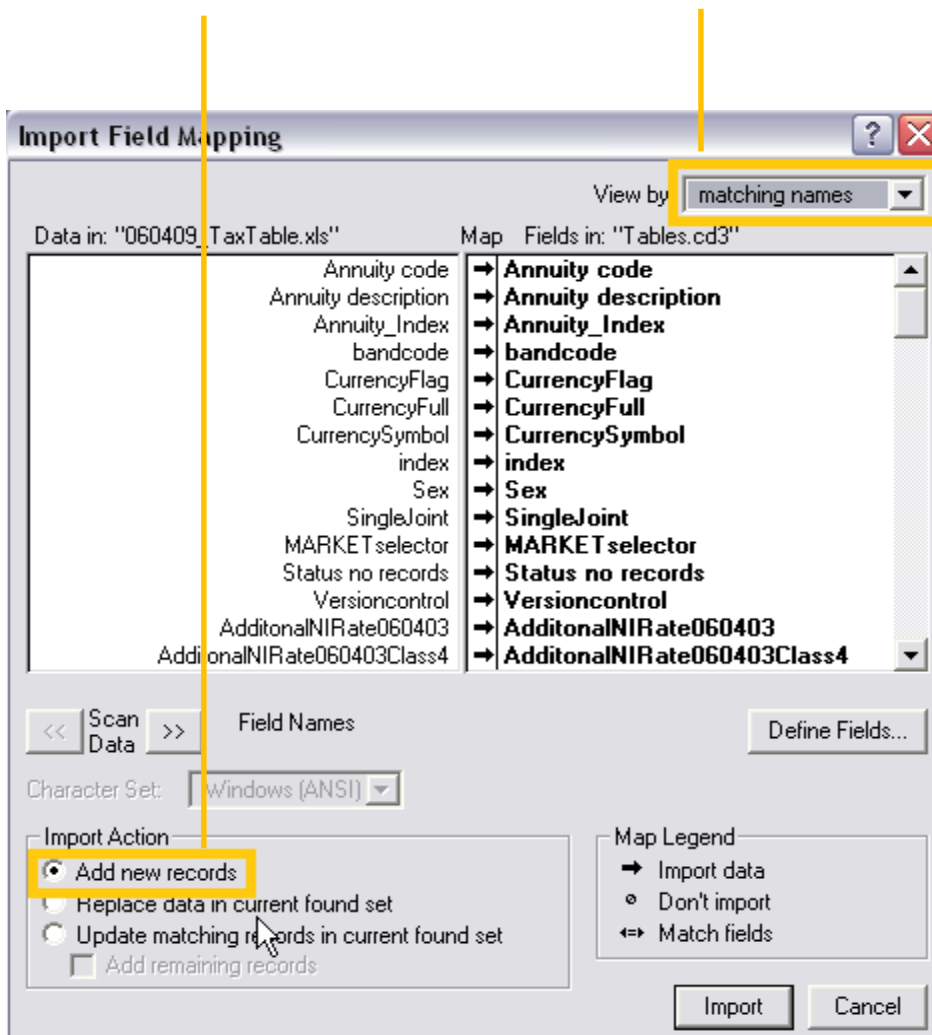
From the top menu, click on **File > Import Records > File**, and navigate to the excel spreadsheet you previously saved on the desktop, select and click **Open**.

You will be presented with the following screen:



Select **Field Names** and then click **OK**.

Choose **Add new records** and View by **matching names** then click **Import**:



Leave **Perform auto-enter options** unticked and click **OK**:

Import Options

☐ Perform auto-enter options while importing
(modification date, serial number, lookups, etc.)

Import values in repeating fields by:

☒ Keeping them in the original record

☐ Splitting them into separate records

OK

Cancel

Your new 2017 tax record will now be imported into the Client Care Desktop system as follows:

Setup

Setup > Tables

Personal tax

Pension cont.s

Annuity rates

Indices

Currencies

Tax year for which rates are held

The 2017/18 tax year, beginning 06/04/2017

The 2016/17 tax year, beginning 06/04/2016

The 2015/16 tax year, beginning 06/04/2015

The 2014/15 tax year, beginning 06/04/2014

The 2013/14 tax year, beginning 06/04/2013

The 2012/13 tax year, beginning 06/04/2012

The 2011/12 tax year, beginning 06/04/2011

The 2010/11 tax year, beginning 06/04/2010

The 2008/09 tax year, beginning 06/04/2008

The 2007/08 tax year, beginning 06/04/2007

The 2006/07 tax year, beginning 06/04/2006

The 2005/06 tax year, beginning 06/04/2005

The 2004/05 tax year, beginning 06/04/2004

Quit



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