

Client Care Desktop

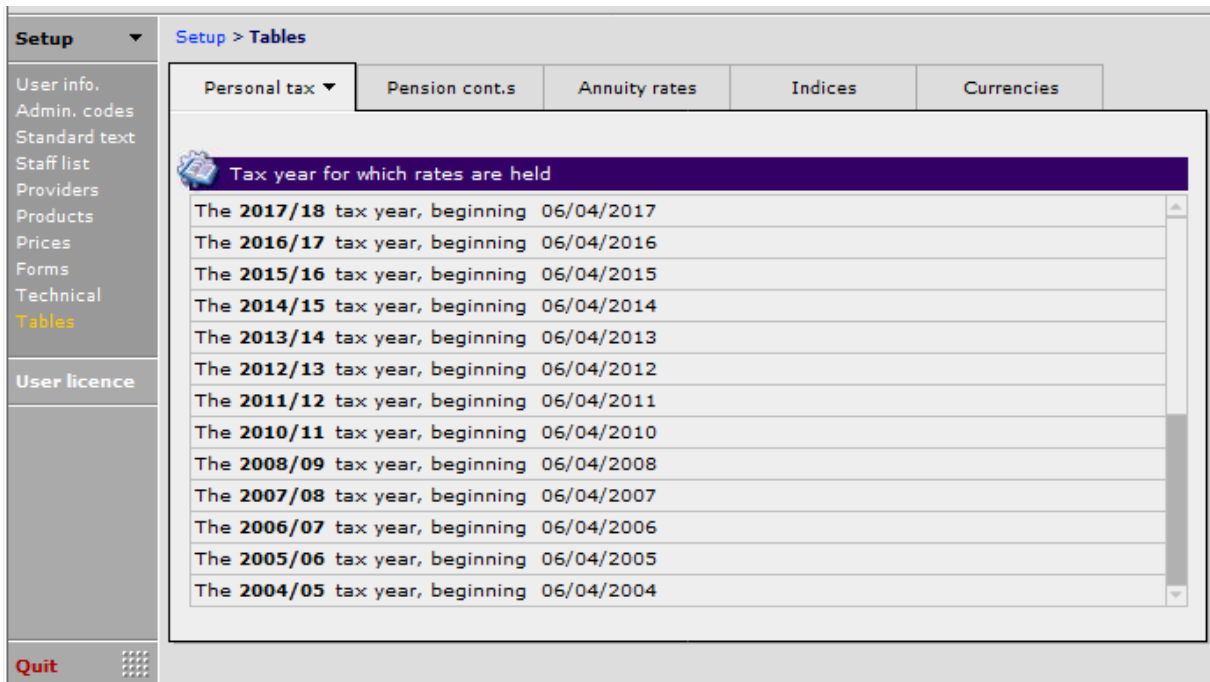
Importing the 2018/19 Tax Table
(CCD Version 3.x)



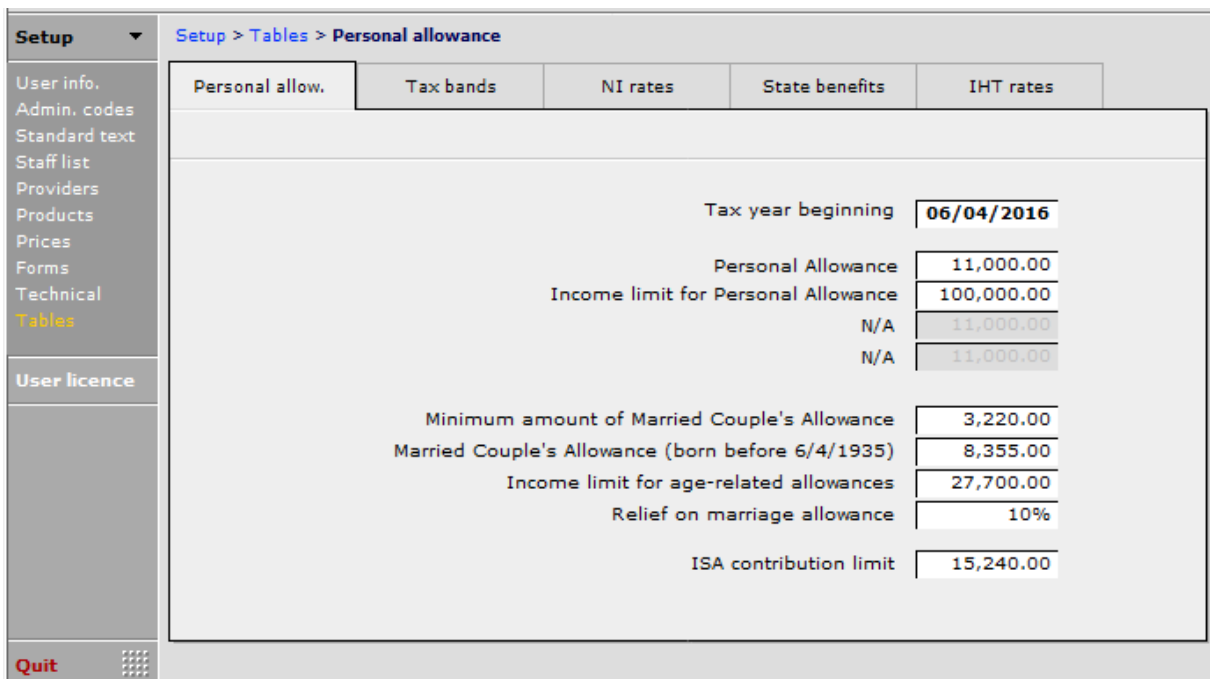
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The first step in adding the 2018 tax record to Client Care Desktop (CCD) is to save the excel spreadsheet 'Tax Tables_2018_2019' to your desktop as you will need to import this file into your system.

To import the 2018/19 tax record into CCD, navigate to **Setup > Tables**:

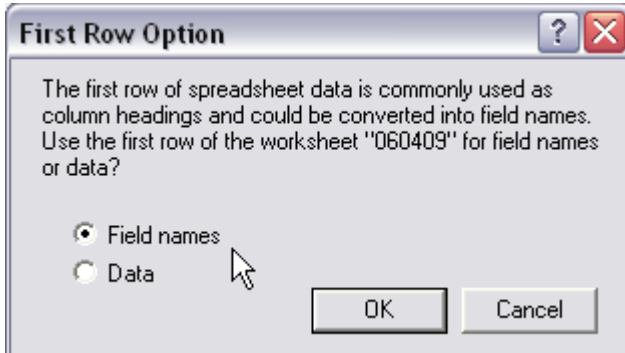


Click on any tax table in the list, you will see the following screen:



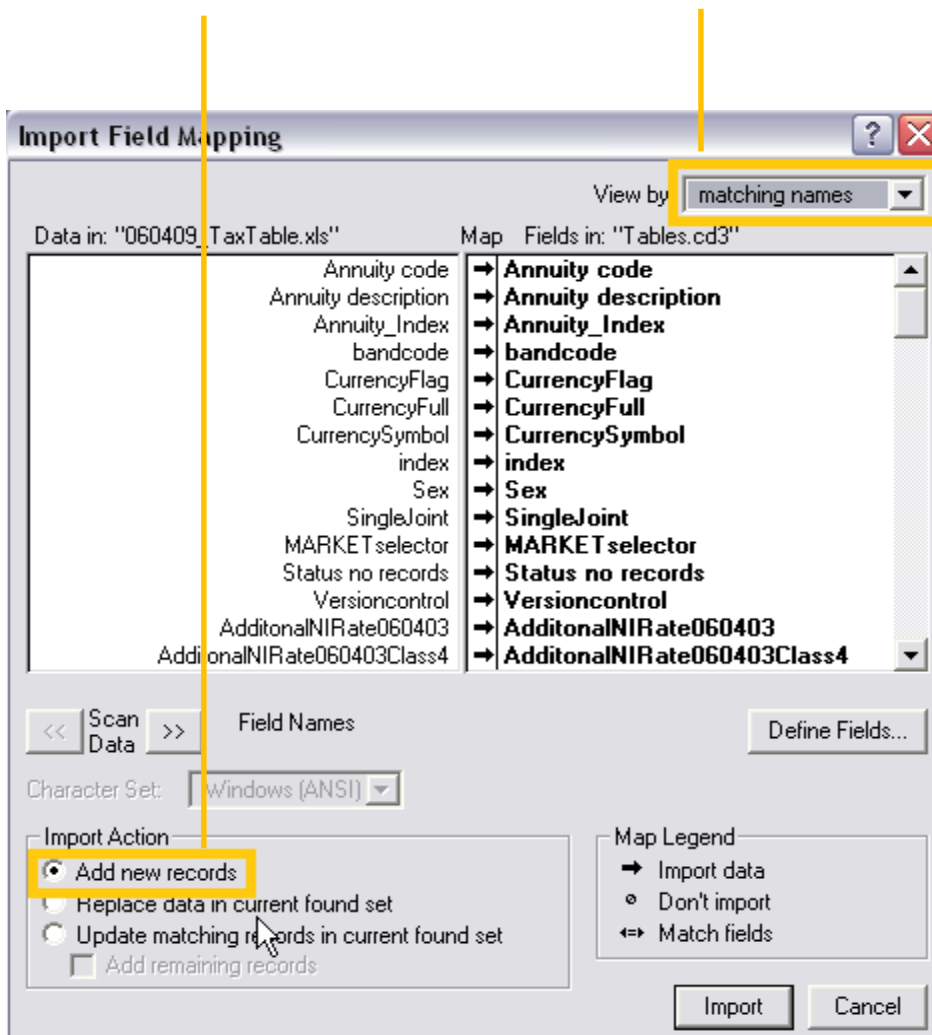
From the top menu, click on **File > Import Records > File**, and navigate to the excel spreadsheet you previously saved on the desktop, select and click **Open**.

You will be presented with the following screen:

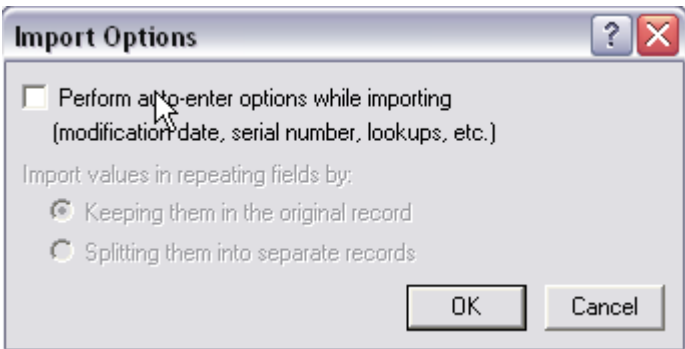


Select **Field Names** and then click **OK**.

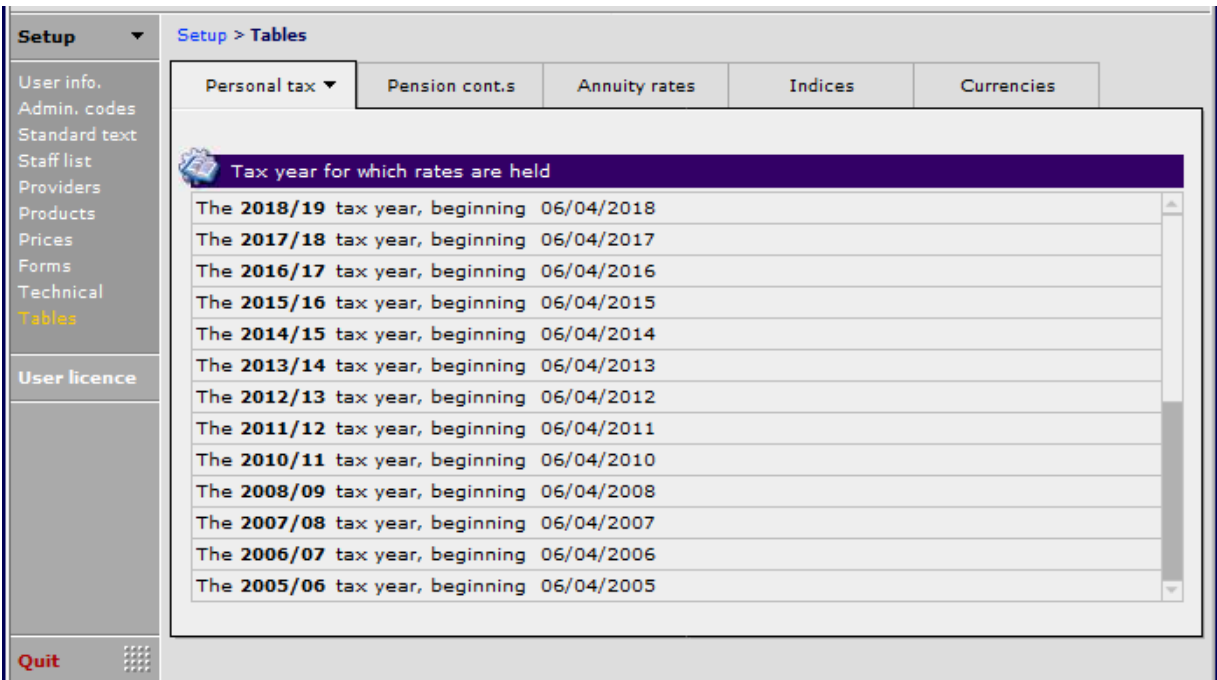
Choose **Add new records** and View by **matching names** then click **Import**:



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



Your new 2018 tax record will now be imported into the Client Care Desktop system as follows:





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