

Client Care Desktop

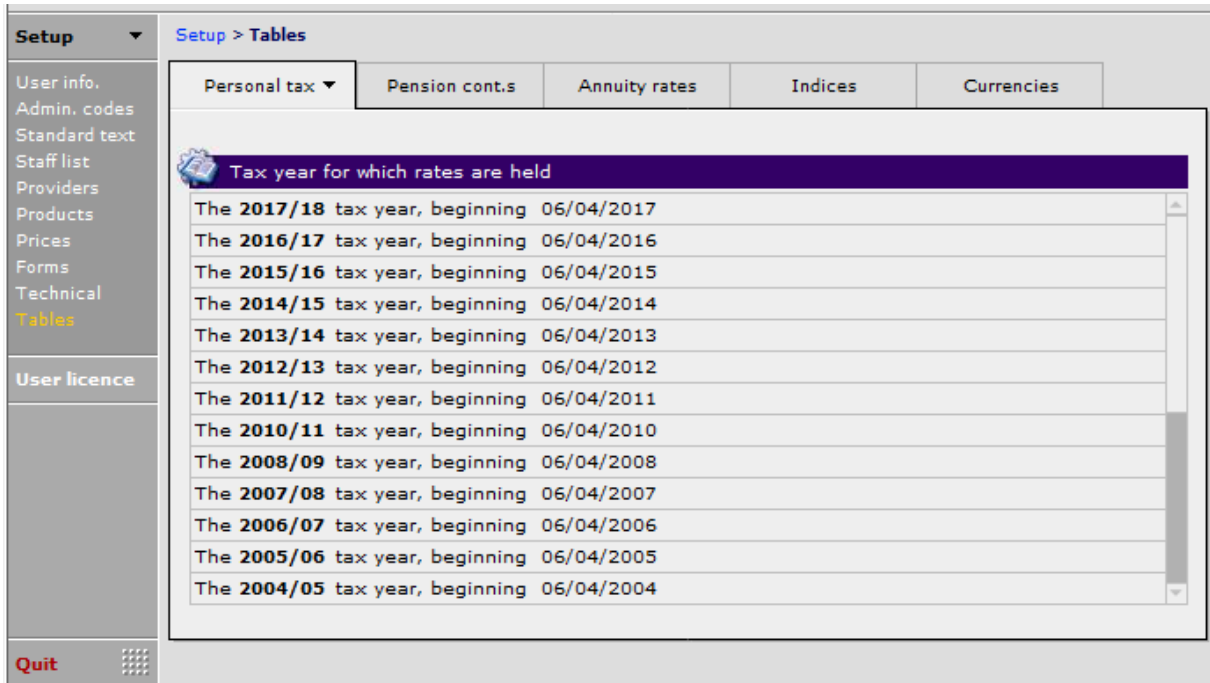
Importing the 2018/19 Tax Table
(CCD Version 4.x)



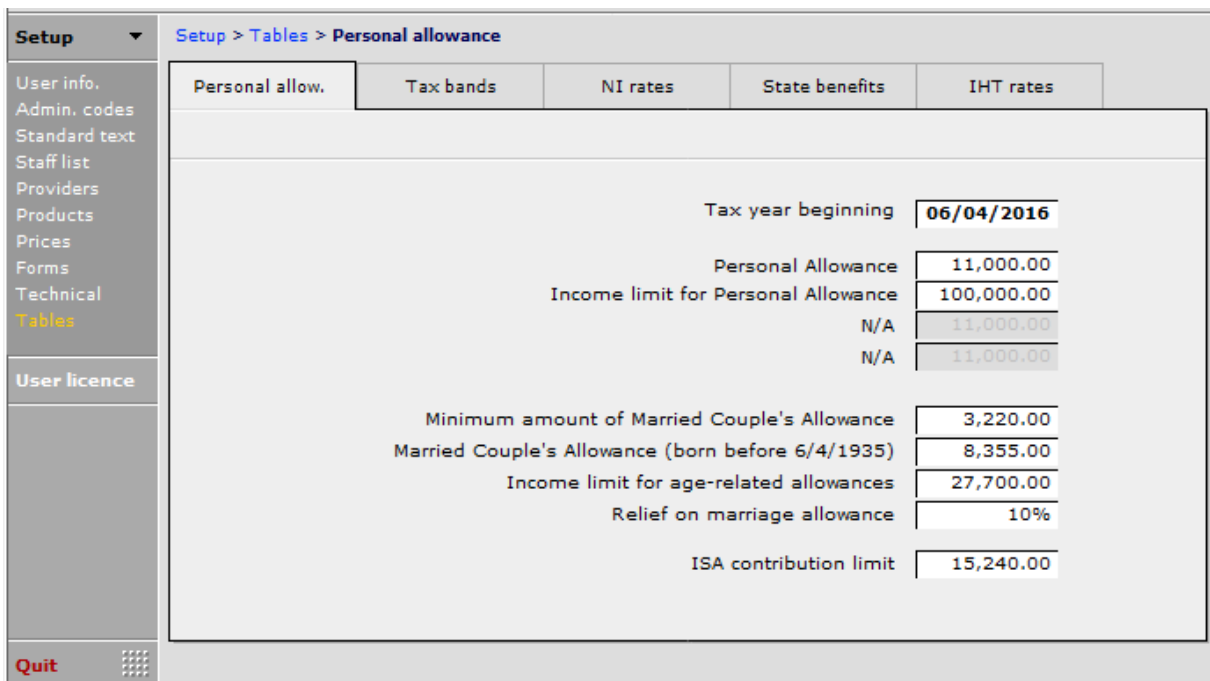
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CLIENT CARE

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.

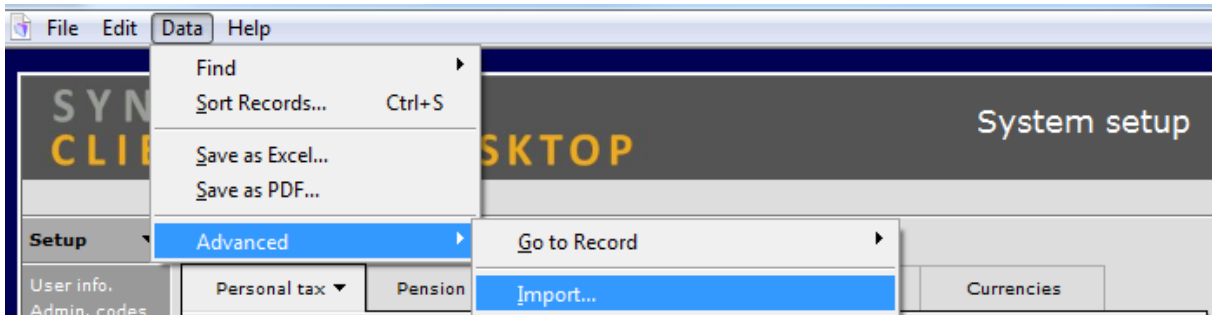
To import the 2018/19 tax record into CCD, navigate to *Setup > Tables*:



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



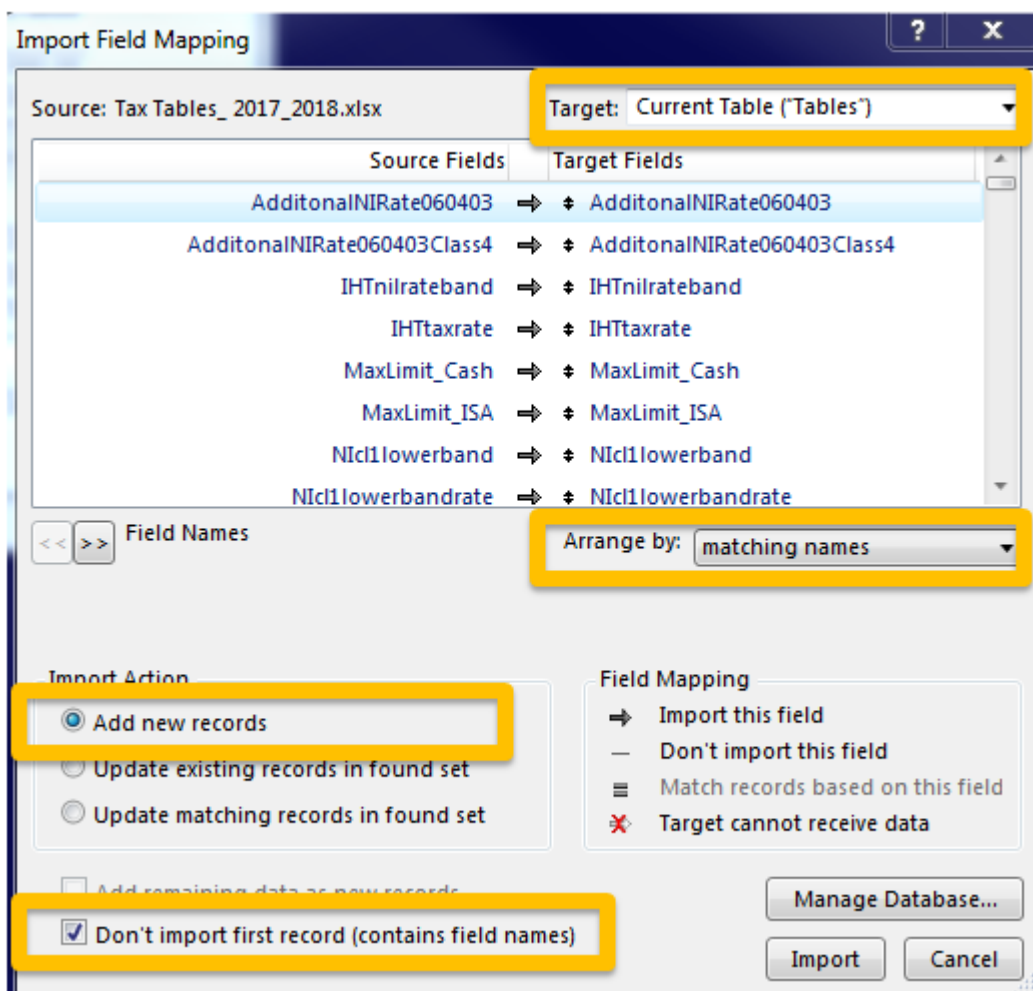
From the top menu click on **Data > Advanced > Import**, and navigate to the excel spreadsheet you previously saved on the desktop, select and click **Open**.



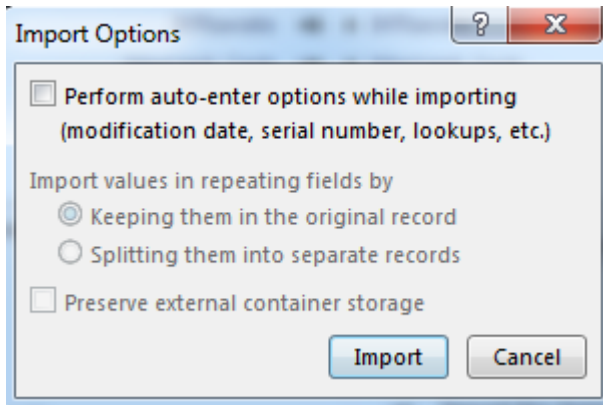
The Target should show **Current Table ('Tables')**.

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.

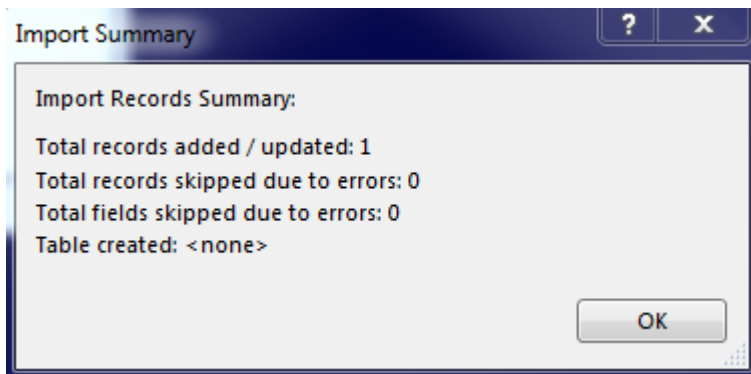
Once everything is set as highlighted below, click **Import**:



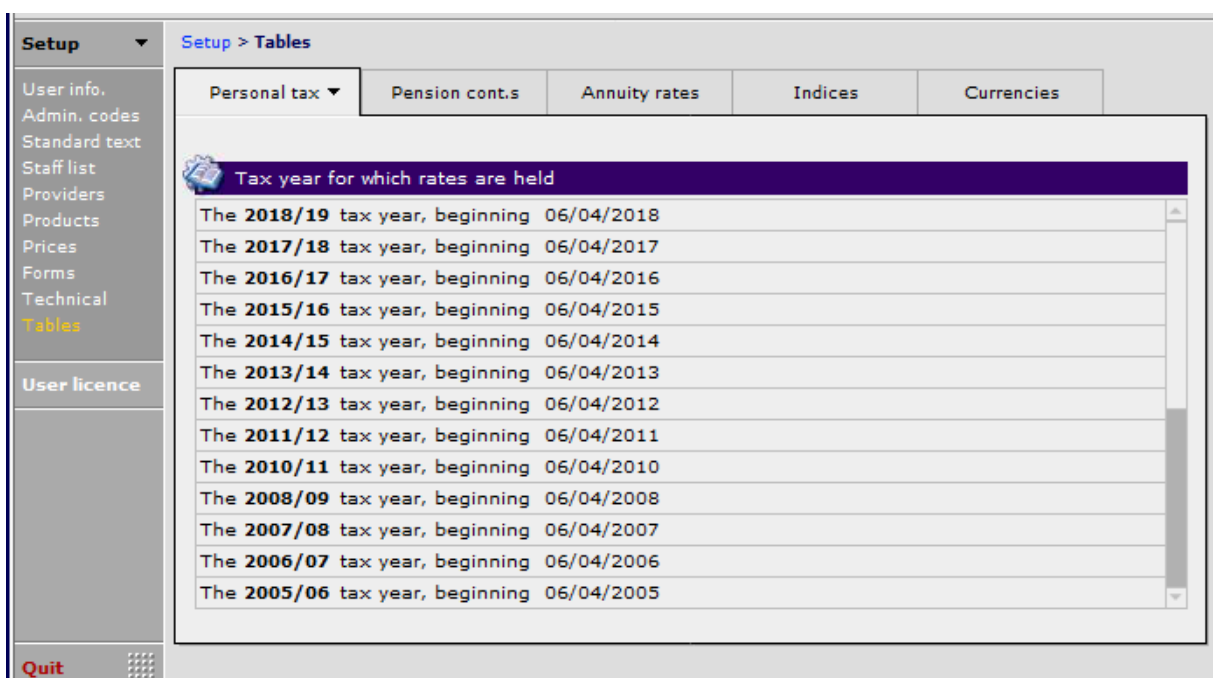
Leave **Perform auto-enter options** unticked and click **Import**.



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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