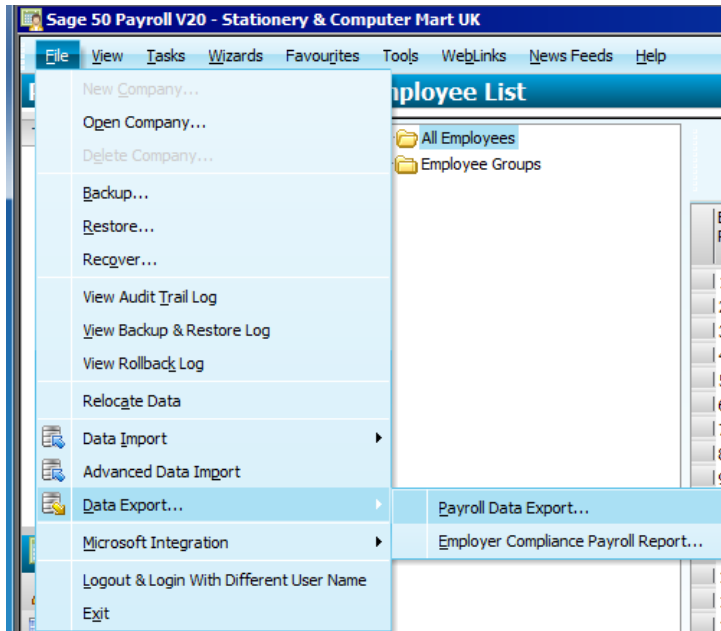


Sage 50 – Import from CSV into BrightPay

1. Within Sage 50 you will the option to export your employee information to a CSV file. This personal information can then be imported in to BrightPay.

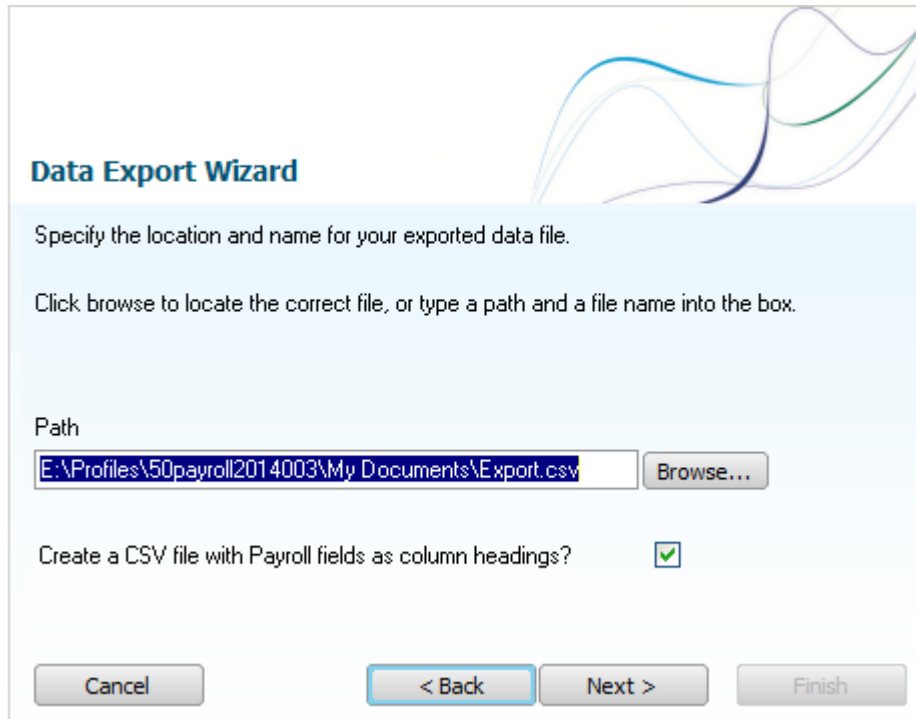
To export your Employee CSV click **File > Data Export > Payroll Data Export**



2. Next Select **Employee Details** and click “Next”



3. Select the location where you would like to save your file to by pressing the **Browse** button, click **Next** when ready.



Data Export Wizard

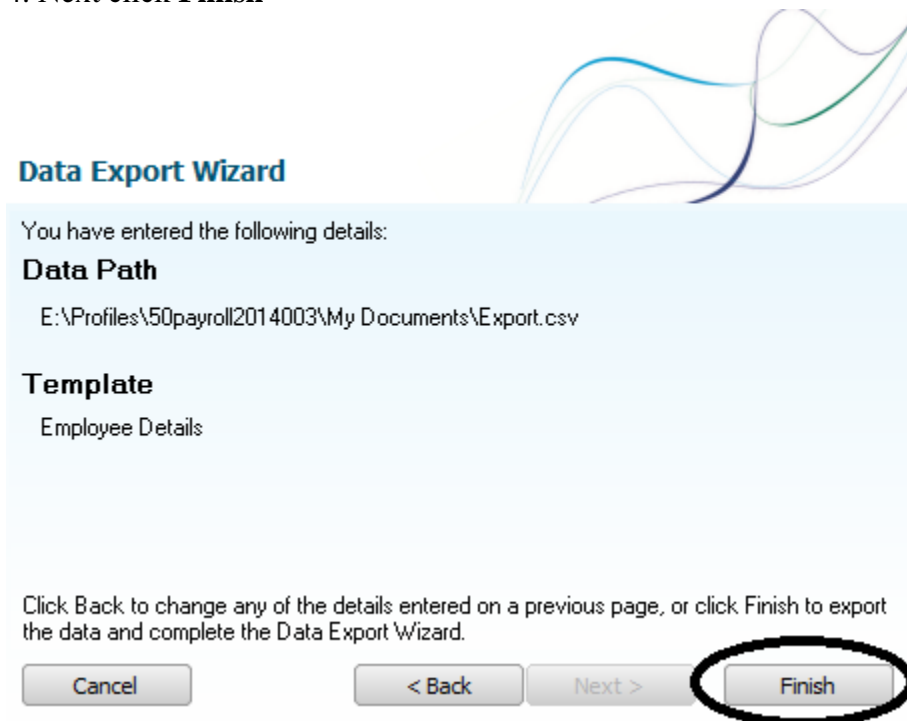
Specify the location and name for your exported data file.

Click browse to locate the correct file, or type a path and a file name into the box.

Path

Create a CSV file with Payroll fields as column headings? ☒

4. Next click **Finish**



Data Export Wizard

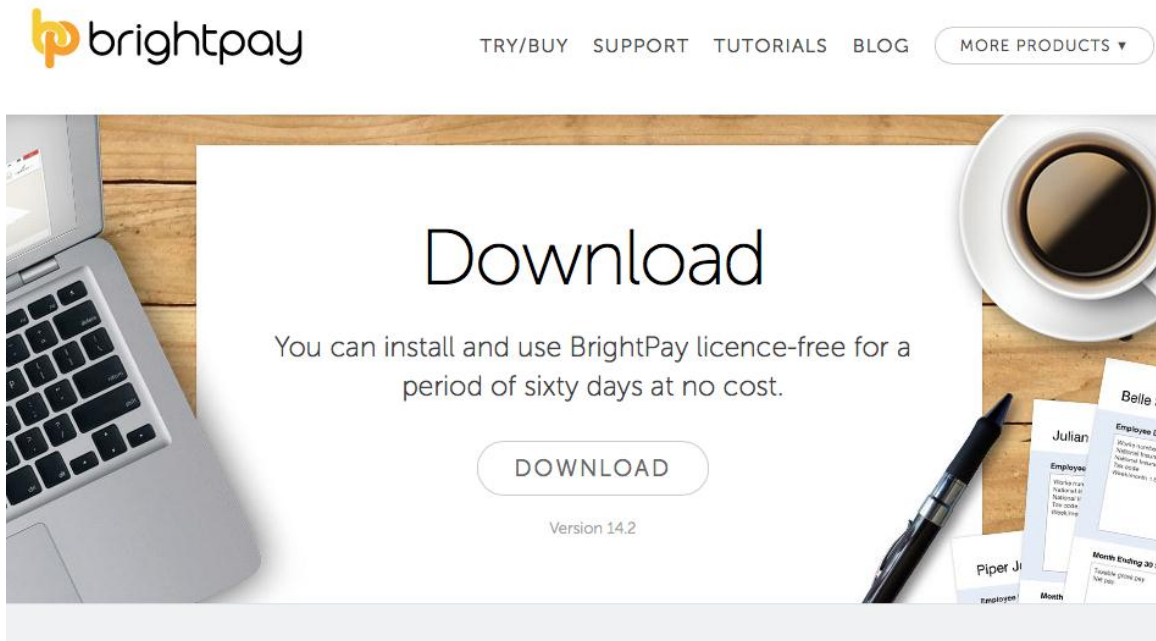
You have entered the following details:

Data Path
E:\Profiles\50payroll2014003\My Documents\Export.csv

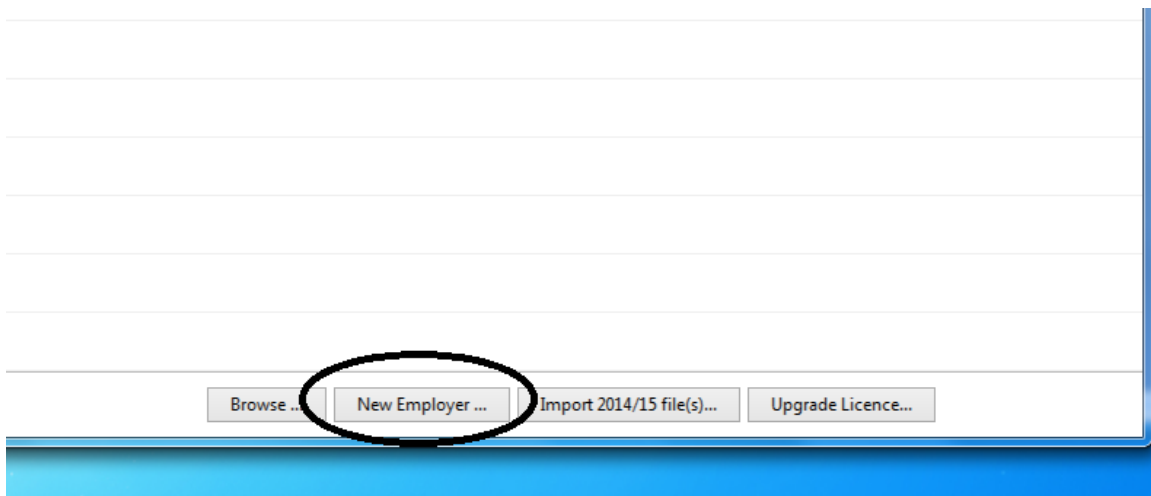
Template
Employee Details

Click Back to change any of the details entered on a previous page, or click Finish to export the data and complete the Data Export Wizard.

6. Next you will need to Download and Install **BrightPay** from our website www.brightpay.co.uk



7. Once downloaded **BrightPay** will open, select **New Employer** to create your company.



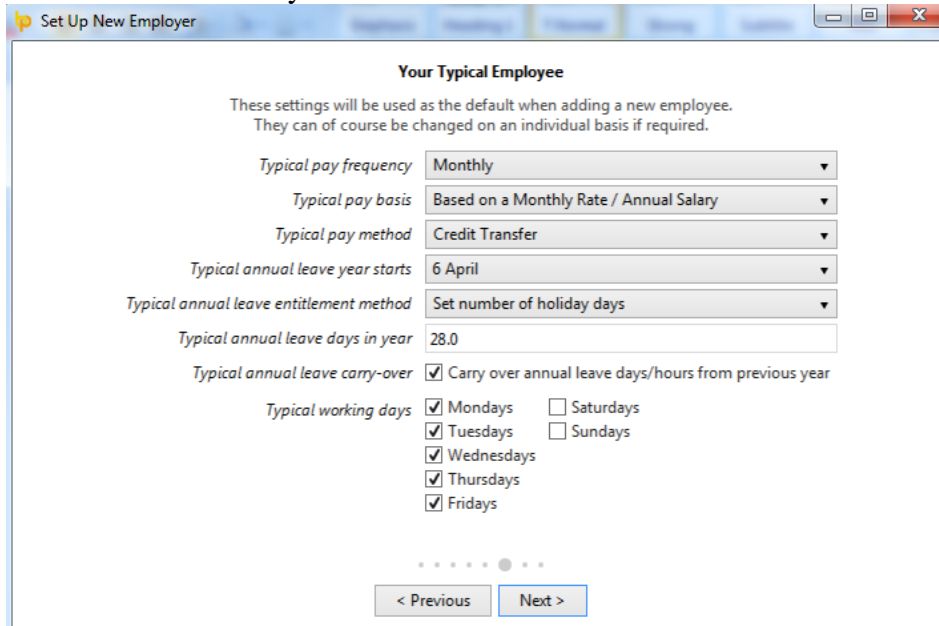
8. Add in your Company information, such as **Name** and **address** and click **Next**

The screenshot shows the 'Set Up New Employer' window with the title bar 'Set Up New Employer'. The main content area is titled 'Employer Name' and 'Address'. Under 'Employer Name', there is a text box labeled 'Name' containing 'Black Heavy Metal Ltd'. Under 'Address', there are four text boxes: 'Address' containing '186 Manor Road', 'City' containing 'London', 'Address Line 3' (empty), and 'Address Line 4' (empty). Below these is a 'Country' dropdown menu set to 'England'. At the bottom, there is a progress bar with six dots, the second of which is filled, and two buttons: '< Previous' and 'Next >'. The 'Next >' button is highlighted in blue.

9. Enter your **PAYE** number and **Accounts Office Reference** click **Next** when ready.

The screenshot shows the 'Set Up New Employer' window with the title bar 'Set Up New Employer'. The main content area is titled 'Employer Registration'. It contains three text boxes: 'HMRC office name' (empty), 'Employer PAYE Reference' containing '864' followed by a slash and '3GNU2JO3O2', and 'Accounts Office Reference' containing the text 'Optional for set up. Will be required when sending RTI submissions.'. Below these is a section titled 'Additional' with a checkbox labeled 'Small Employers' Relief' which is checked, and a text box labeled 'Employer Contracting-Out Number (ECON)' containing 'If applicable'. At the bottom, there is a progress bar with six dots, the third of which is filled, and two buttons: '< Previous' and 'Next >'. The 'Next >' button is highlighted in blue.

10. Enter your **Typical Employee Setting**, such as pay frequency, working days etc. Click **Next** when ready.



Set Up New Employer

Your Typical Employee

These settings will be used as the default when adding a new employee. They can of course be changed on an individual basis if required.

Typical pay frequency: Monthly

Typical pay basis: Based on a Monthly Rate / Annual Salary

Typical pay method: Credit Transfer

Typical annual leave year starts: 6 April

Typical annual leave entitlement method: Set number of holiday days

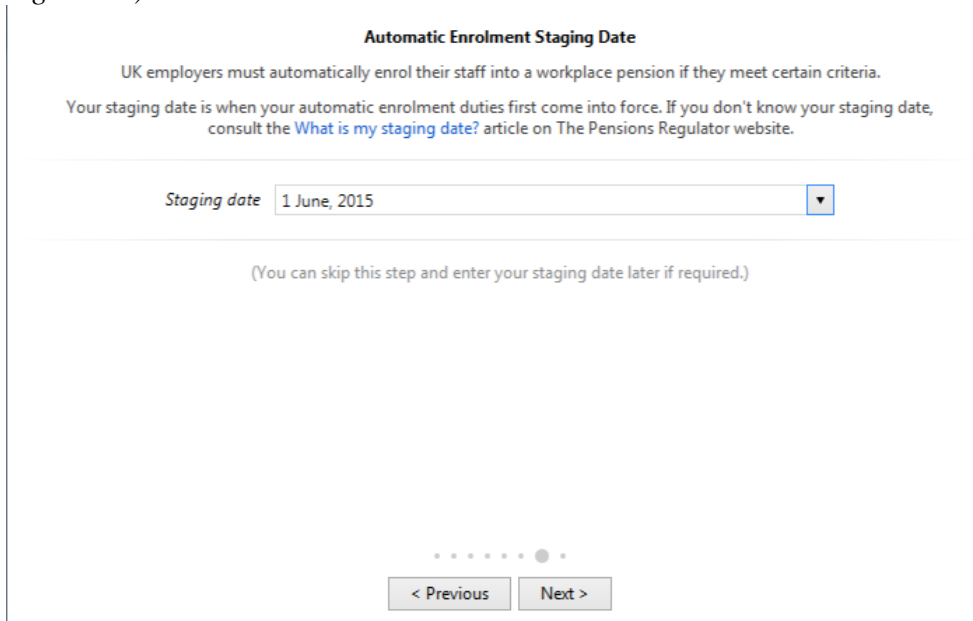
Typical annual leave days in year: 28.0

Typical annual leave carry-over: ☒ Carry over annual leave days/hours from previous year

Typical working days: ☒ Mondays ☐ Saturdays ☒ Tuesdays ☐ Sundays ☒ Wednesdays ☒ Thursdays ☒ Fridays

< Previous Next >

11. If Applicable enter your **Staging Date**, (*This would be sent to you by the pension regulator.*)



Automatic Enrolment Staging Date

UK employers must automatically enrol their staff into a workplace pension if they meet certain criteria.

Your staging date is when your automatic enrolment duties first come into force. If you don't know your staging date, consult the [What is my staging date?](#) article on The Pensions Regulator website.

Staging date: 1 June, 2015

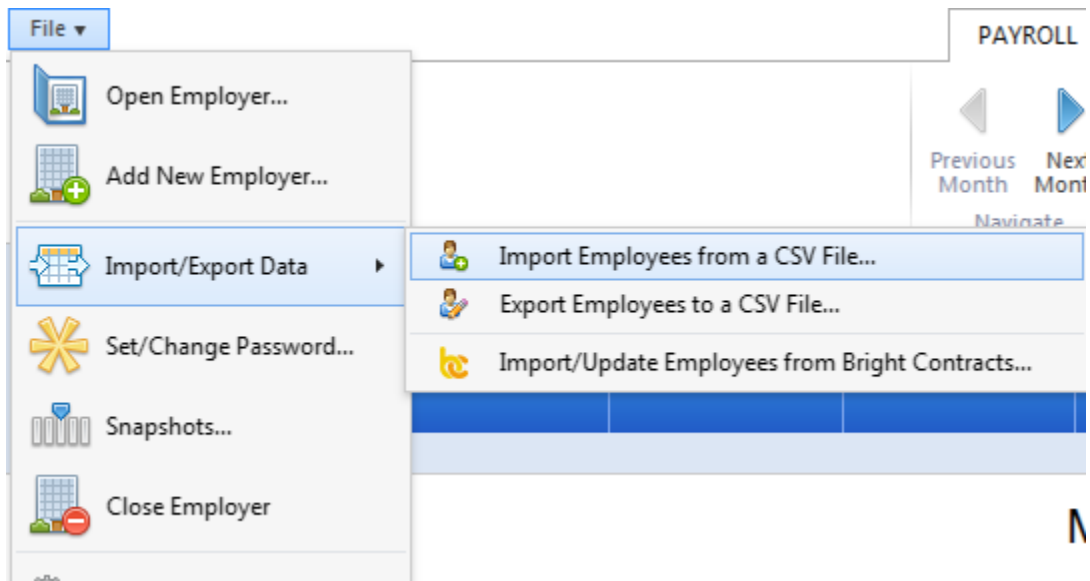
(You can skip this step and enter your staging date later if required.)

< Previous Next >

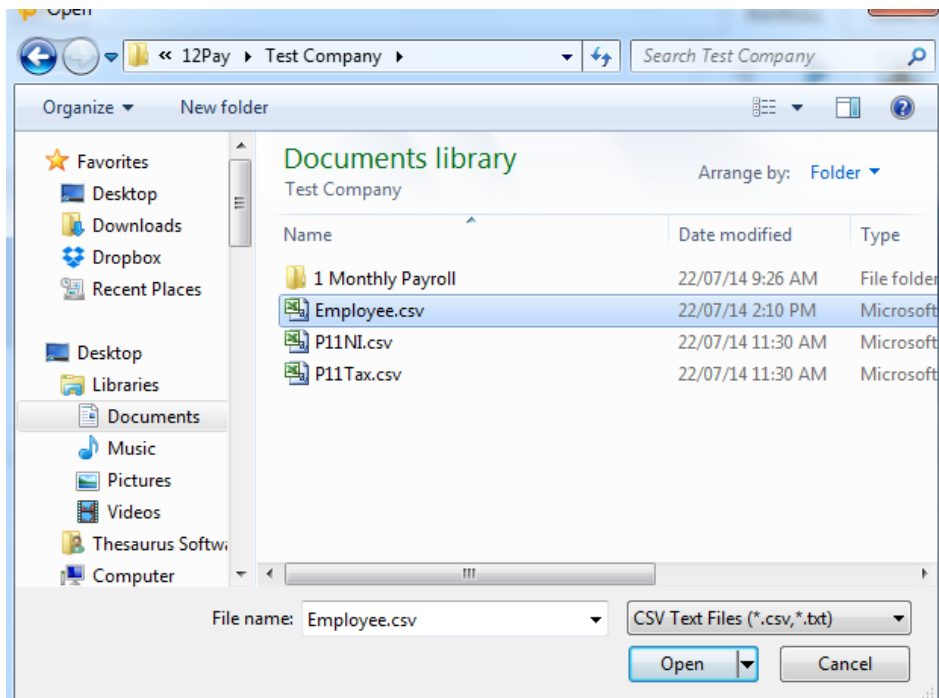
12. If required enter a **password** and when ready click **Save and Finish**. Your company will now be added to the program.

The screenshot shows a window titled "Set Up New Employer". Inside, the main heading is "Create Your BrightPay Employer Data File". Below this, a message states: "To protect the information in your employer data file you may optionally set a password, which will be required to open the data file in future." There is a section labeled "Use a password" with a checkbox "Protect your employer data file with a password". Below the checkbox are two text input fields labeled "Enter password" and "Confirm password". A line of text below the fields says "When you're ready, click Save and Finish." At the bottom of the window, there are two buttons: "< Previous" and "Save and Finish ...". A progress indicator with seven dots is visible above the buttons, with the seventh dot being filled.

13. Open your company, to import your Employees go to **File > Import/ Export Data > Import from a CSV file**



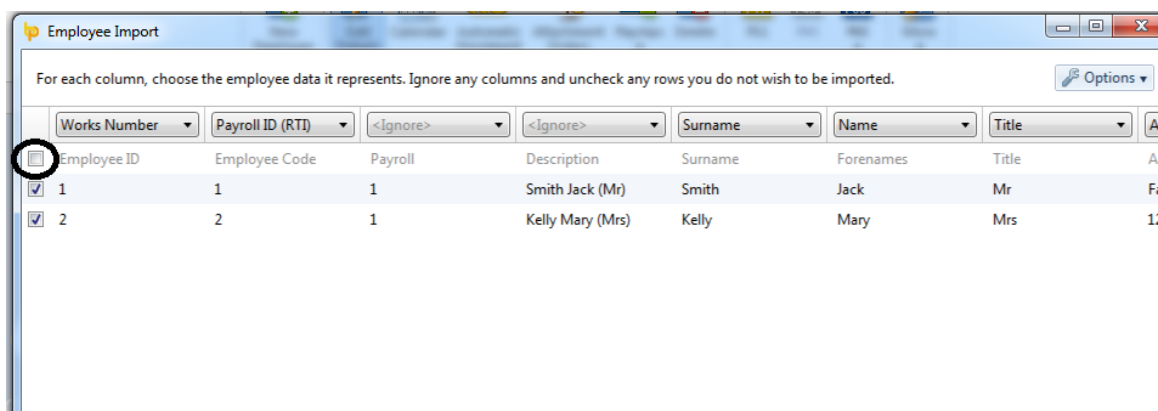
14 Browse to the location of your Employee CSV file. Once selected press **Open**



15. Select from the dropdown select what information is in each column, move the scroll bar to the right to select address, date of birth, gender.gross to date etc.

n.b Don't forget to untick the first line of the import as these are headers which you should not import

Once all the necessary information has been select click **Import**



16. You will now see all your employee personal information. To view go in to the **Employee** Tab. Your employees will be listed on the left hand side.

File ▾

Brenden Stewart

Dominique Wilkins

Emma Schneider

Jael Hoover

Jolene Mercado

Kay Stanley

Maya Stafford

Rhonda Lott

17. You can now start to run your payroll. To set up your payroll schedule go to **Payroll** and select your first pay date and week/ month ending date.

Set Up Monthly Schedule

My first monthly pay date will be

for the month ending on the of

