

12 Pay – Import from CSV into BrightPay

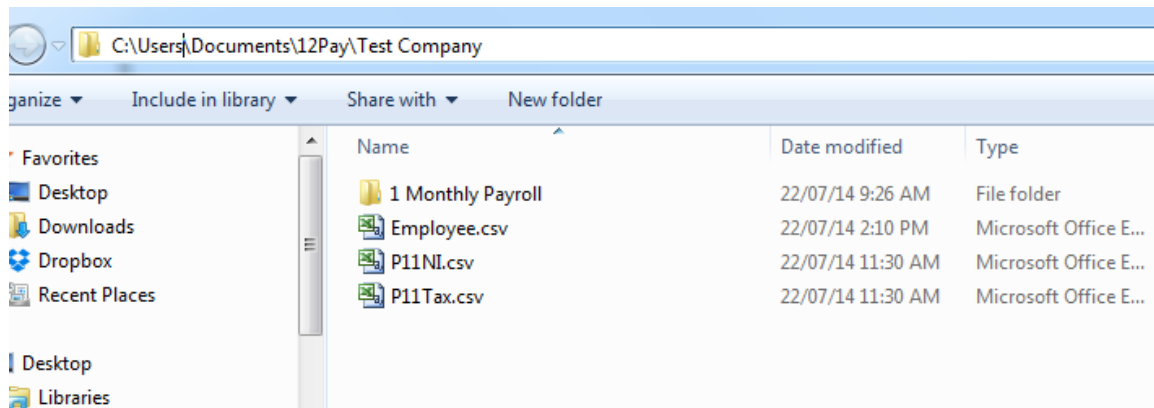
1. To export a CSV file with employee information from 12 Pay to BrightPay the first step is to select the **Company name**, and then select **Export** at the bottom

The screenshot shows the 'Test Company - 12Pay 1.15.5' window. On the left is a tree view with 'Test Company' expanded, showing 'Payments/Deductions', 'Create new payroll...', 'Monthly Payroll (Month 2, 31/05/14)', 'Add new employee...', 'Kelly Mary (Mrs) (2)', and 'Smith Jack (Mr) (1)'. The main area is the 'Employer' tab, containing fields for 'Employer' (Test Company), 'Address' (123 High Street, High Road, London), 'Postcode' (WC2R45), 'Report PAYE Year' (2014 / 2015), 'Tax Reference', 'ECON', 'SCON', 'Small Employer' (checked), 'Recast', 'Registration Key' (klwYHfDhWUP2fPN3), 'Logo on Reports', 'Mail...', 'Premium: 97858', 'Claim Employer NI Allowance', 'HMRC Internet Submissions' (User ID, Password, Accounts Office Reference, RTI Status: Live, Contact, Email Address, Telephone Number, Sender: Employer, Self Assessment UTR, Corporation Tax UTR). At the bottom, there are buttons for 'Reports', 'Internet P35 & P45s', 'Export' (circled in red), and 'HMRC Data'.

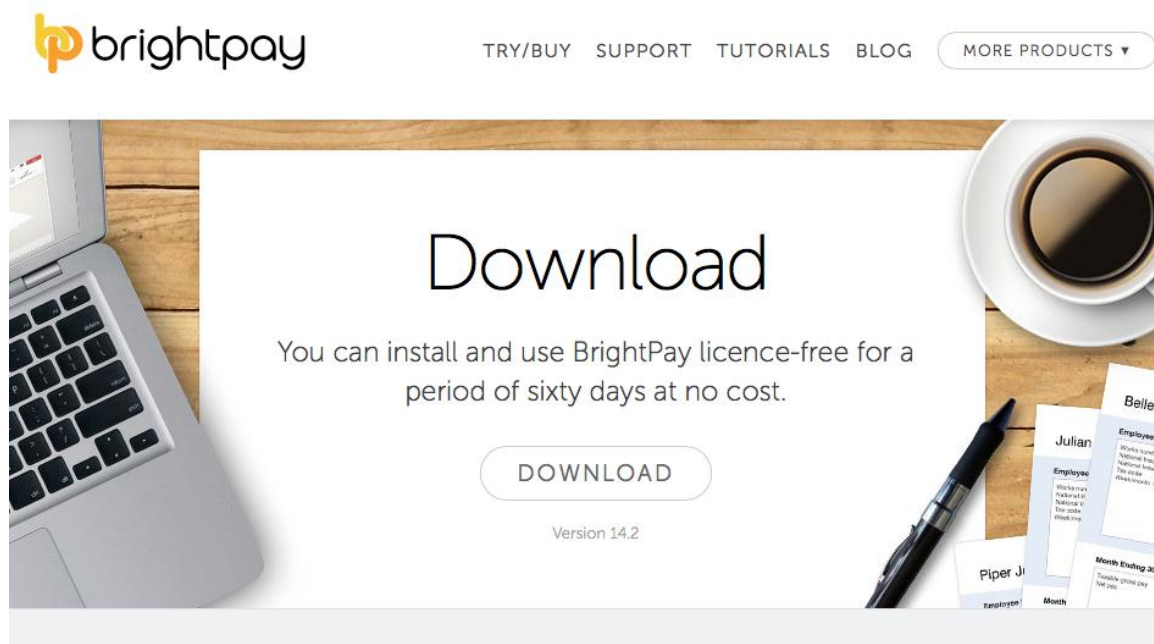
2. Insure that **All** Pay frequencies are selected and tick to export **Employees**. When ready click **Export to CSV**

The 'Pick Data to Export' dialog box is shown. It has three main sections: 'Frequency' with radio buttons for 'All' (selected), 'Month', 'Week', 'Fortnight', and 'Four Weekly'; 'Which Period?' with 'Year' and 'Period' (set to 0) fields, and instructions to 'Leave Blank for All Years' and 'Leave Blank for All Periods'; and 'What?' with checkboxes for 'Employee' (checked), 'P11 Tax' (checked), 'P11 NI' (checked), 'Regular Payments', 'Payslips', 'Absences', and 'Basic Data Only' (checked). At the bottom are buttons for 'Export to CSV', 'Export to Excel', and 'Cancel'.

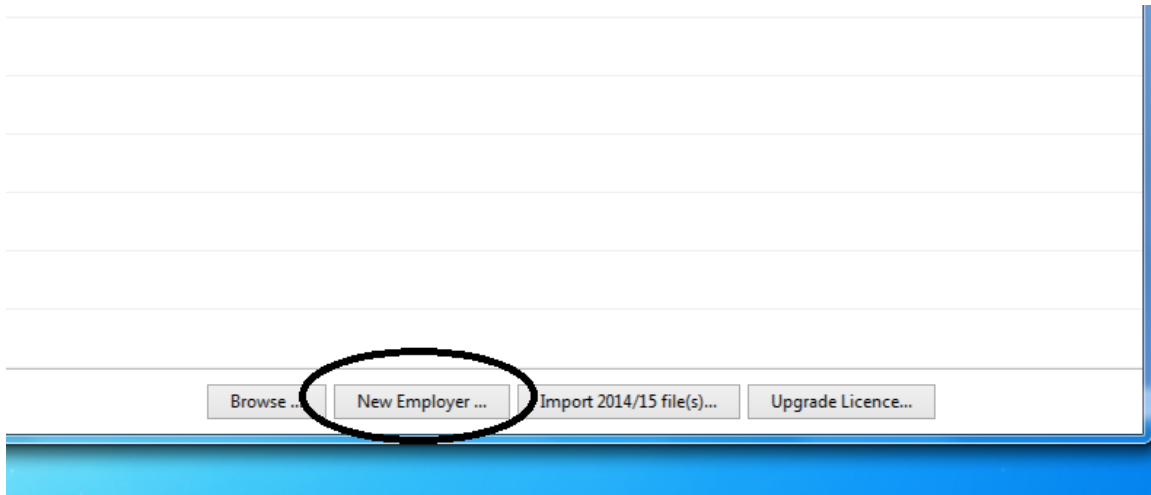
3. Your Employee CSV files will now be exported and located in your Documents Folder. You are now ready to import this file in to BrightPay



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



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



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

A screenshot of the 'Set Up New Employer' form in the BrightPay software. The window title is 'Set Up New Employer'. The form is divided into two main sections: 'Employer Name' and 'Address'. Under 'Employer Name', there is a text field labeled 'Name' with the value 'Black Heavy Metal Ltd'. Under 'Address', there are four text fields: 'Address' (186 Manor Road), 'City' (London), 'Address Line 3', and 'Address Line 4'. Below these fields are two dropdown menus: 'Country' (England) and 'Postcode' (E18 8YE). At the bottom of the form, there are two buttons: '< Previous' and 'Next >'. The 'Next >' button is highlighted with a blue border. Above the buttons, there are six dots, with the second dot from the left being filled, indicating the current step in the setup process.

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

The screenshot shows a web browser window titled "Set Up New Employer". The main heading is "Employer Registration". Below this, there are three input fields: "HMRC office name" (empty), "Employer PAYE Reference" (containing "864" and "3GNU2J0302" separated by a slash), and "Accounts Office Reference" (containing the text "Optional for set up. Will be required when sending RTI submissions."). Below these fields is a section titled "Additional". It contains a checkbox labeled "Small Employers' Relief" which is checked, with the text "Employer qualifies for Small Employers' Relief" next to it. Below that is a text field for "Employer Contracting-Out Number (ECON)" with the placeholder text "If applicable". At the bottom of the form, there are two buttons: "< Previous" and "Next >". A progress indicator with five dots is visible above the buttons, with the fourth dot being filled.

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

The screenshot shows the same "Set Up New Employer" window, but now on the "Your Typical Employee" section. The heading is "Your Typical Employee". Below this, there is a note: "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." Below the note are several settings, each with a label and a value: "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), and "Typical annual leave carry-over" (checked, with text "Carry over annual leave days/hours from previous year"). Below these are "Typical working days" with checkboxes for Mondays, Tuesdays, Wednesdays, Thursdays, Fridays, Saturdays, and Sundays. All days from Monday to Friday are checked. At the bottom, there are two buttons: "< Previous" and "Next >". A progress indicator with five dots is visible above the buttons, with the fourth dot being filled.

9. 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

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

Progress indicator: 1 of 5 steps (current step is highlighted)

< Previous Next >

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

Create Your BrightPay Employer Data File

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.

Use a password ☐ Protect your employer data file with a password

Enter password

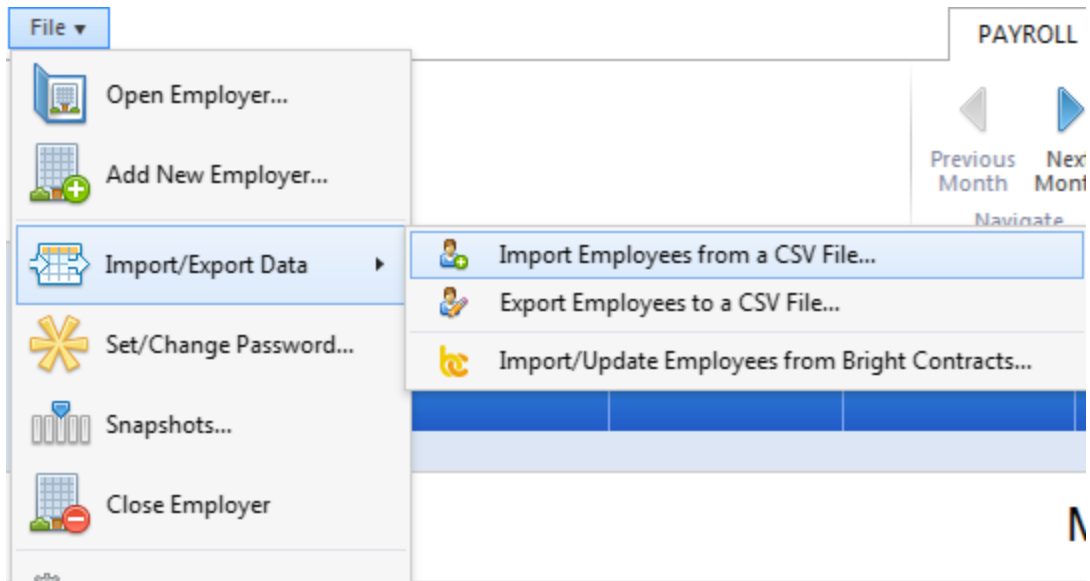
Confirm password

When you're ready, click *Save and Finish*.

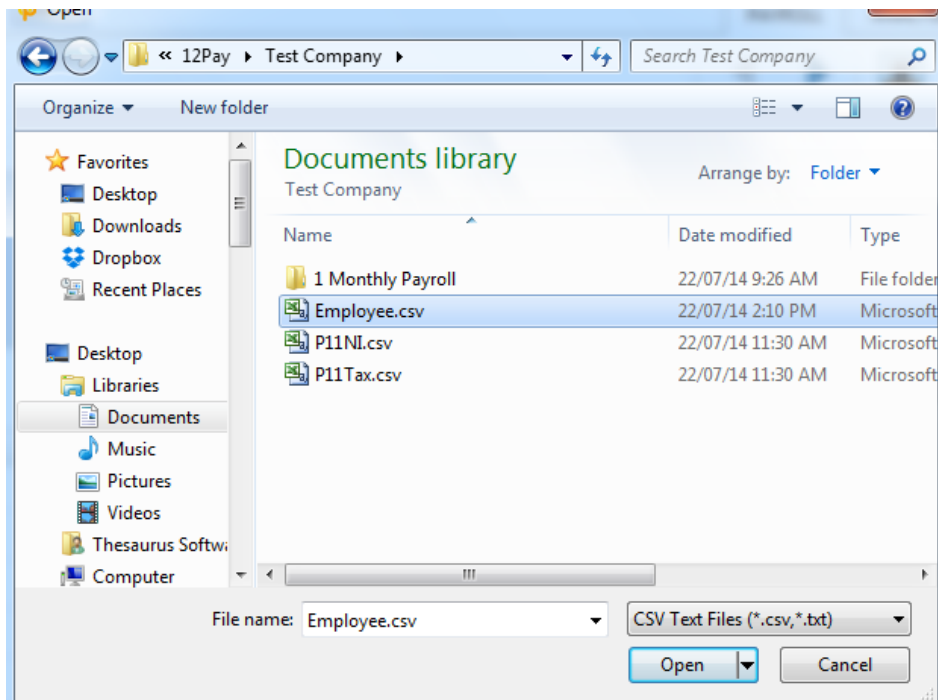
Progress indicator: 1 of 5 steps (current step is highlighted)

< Previous **Save and Finish ...**

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



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



13. 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**

Works Number	Payroll ID (RTI)	<Ignore>	<Ignore>	Surname	Name	Title	
<input type="checkbox"/>	<input type="checkbox"/>			Smith Jack (Mr)	Smith	Mr	A
<input checked="" type="checkbox"/>	1	1		Kelly Mary (Mrs)	Kelly	Mrs	1:

14. 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

15. 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* ▼