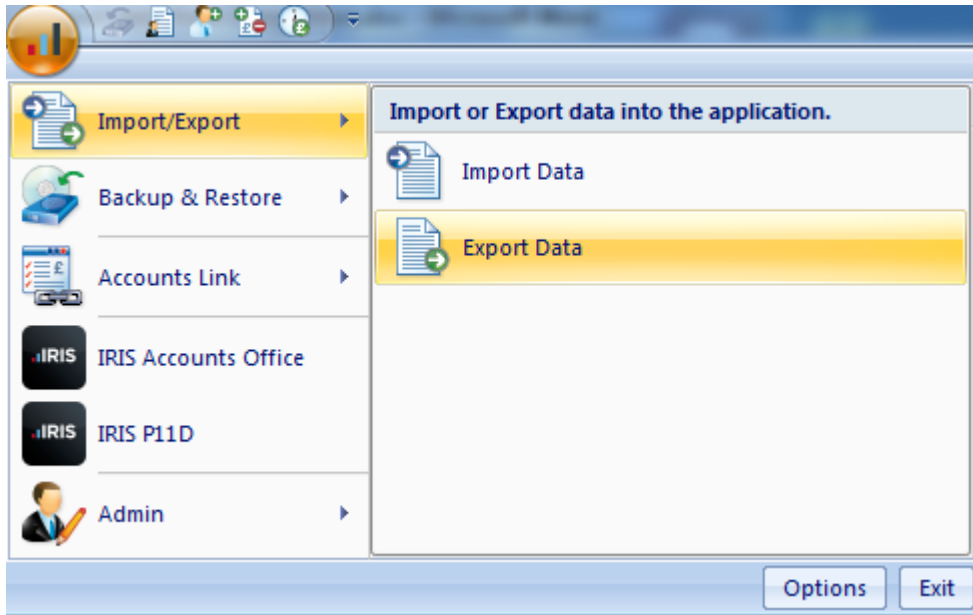


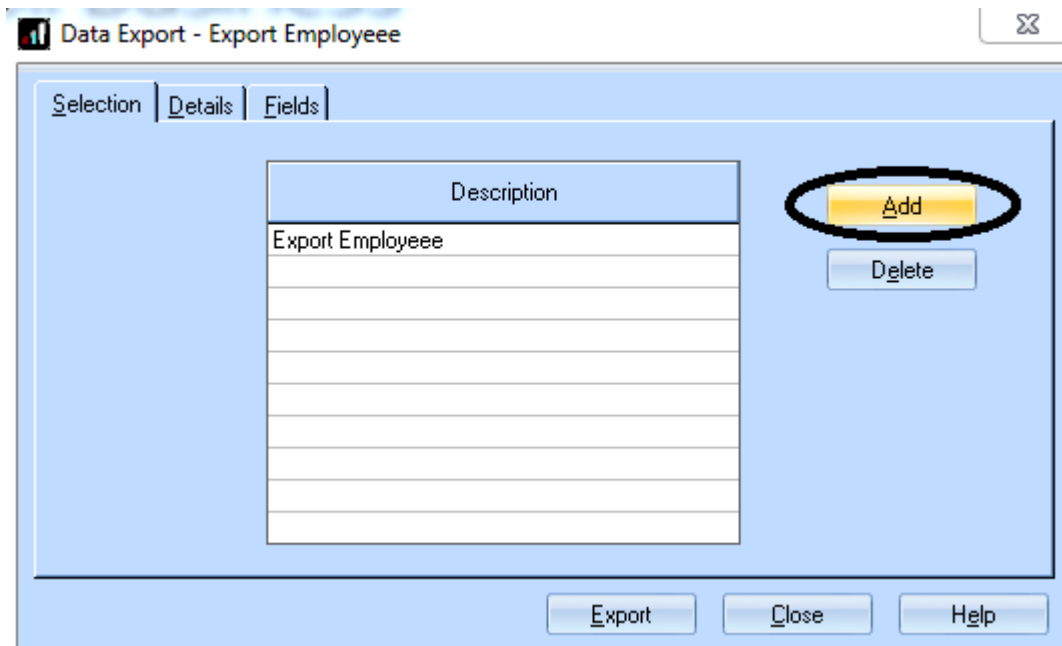
## IRIS – Import from CSV into BrightPay

*Export facility not available in the basics version.*

1. To export employee information to a CSV go to **file > Import/ Export > Export**



2. A new data structure needs to be added and named. Click **Add**, and then type the name of the data structure. Eg. *Export Employee*



3. Next click the **Details** Tab and select the location for your file (by pressing the **Browse** button) and select the file type as **CSV**. In the employee section click for **All** employees

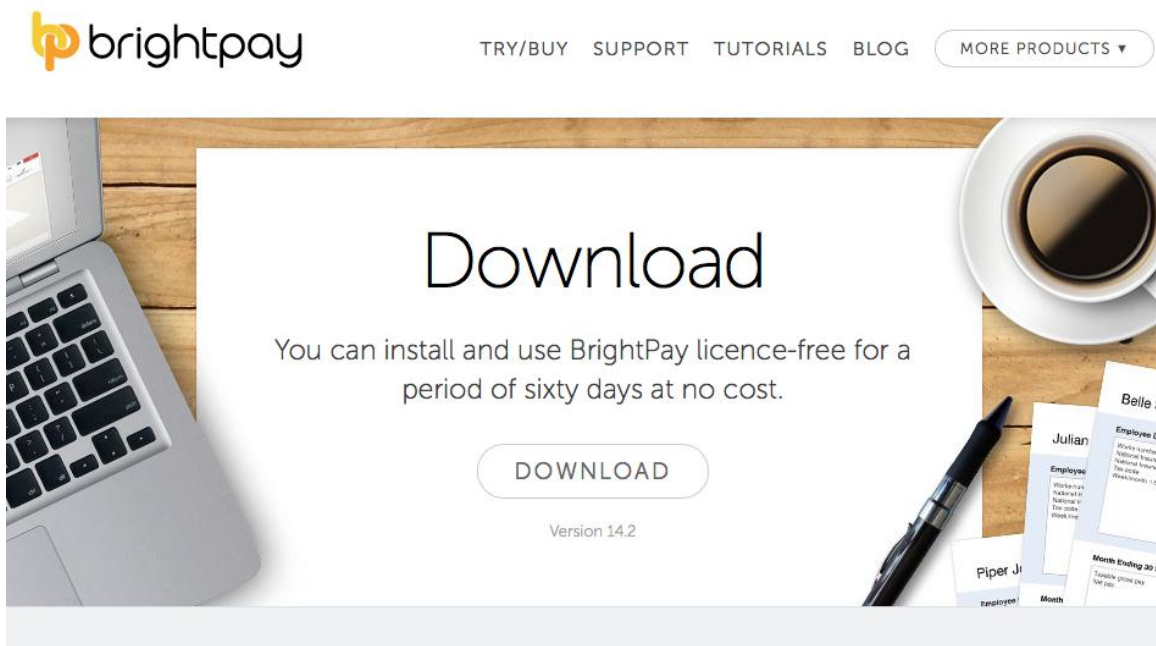
The screenshot shows the 'Data Export - Export Employee' dialog box with the 'Details' tab selected. The 'Export File' field contains the path 'C:\Users\Desktop\Export file.csv' and a 'Browse...' button. The 'File Type' section has two radio buttons: 'Fixed Length Format' and 'Comma Separated (CSV)', with 'Comma Separated (CSV)' selected. The 'Employee Selection' section has two radio buttons: 'All' and 'Selected', with 'All' selected. At the bottom are 'Export', 'Close', and 'Help' buttons.

4. Next in the **Fields** tab Select the fields you wish to export to your CSV file, the employee personal information needs to be exported, finally click **Export**. Your CSV file is now ready to be imported in to BrightPay.

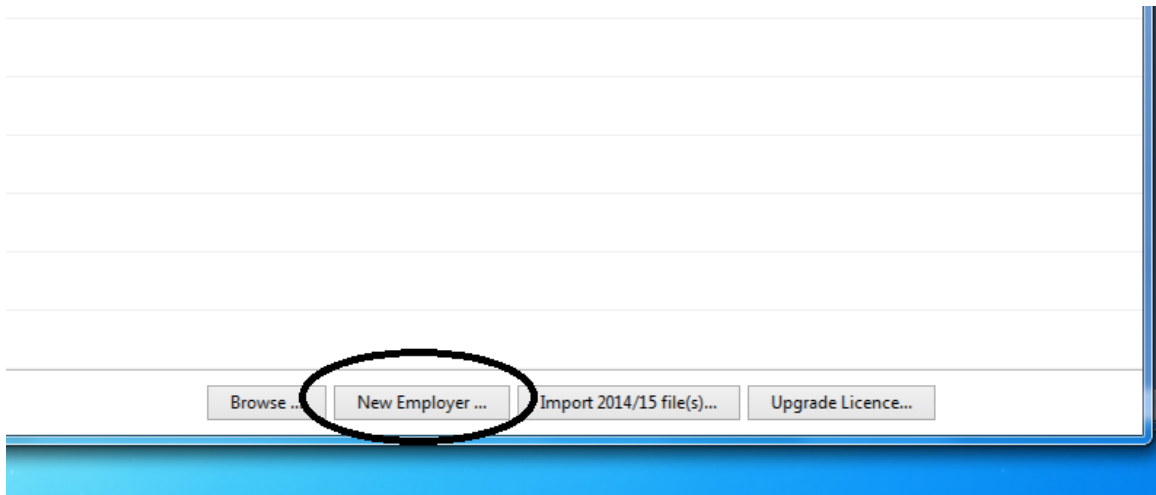
The screenshot shows the 'Data Export - Export Employee' dialog box with the 'Fields' tab selected. It displays a table of fields to be exported. The 'NI Rate' field is selected, and its 'Line' value is 1. To the right of the table are buttons for 'Check', 'Save', 'Insert', 'Delete', and 'Format'. The 'Export' button at the bottom is circled.

Field	ID	Line	Start Position	Length	Default Value
CODE					
Forename 1					
Surname					
Address Line 1					
Address Line 2					
Address Line 3					
Date of Birth					
Tax Basis					
NI Number					
NI Rate		1			

5. Next you will need to Download and Install **BrightPay** from our website [www.brightpay.co.uk](http://www.brightpay.co.uk)



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



7. 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 'Postcode' box containing 'E18 8YE' and a 'Country' dropdown menu set to 'England'. At the bottom, there are navigation buttons: '< Previous' and 'Next >'. A progress indicator shows 6 steps, with the first step being active.

8. 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' and 'Additional'. Under 'Employer Registration', there are three text boxes: '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.'. Under 'Additional', there is 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 are navigation buttons: '< Previous' and 'Next >'. A progress indicator shows 6 steps, with the second step being active.

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

The screenshot shows a web browser window titled 'Set Up New Employer'. The main heading is 'Your Typical Employee'. Below it, a note states: '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.' The form contains several fields and checkboxes:

- Typical pay frequency:** A dropdown menu with 'Monthly' selected.
- Typical pay basis:** A dropdown menu with 'Based on a Monthly Rate / Annual Salary' selected.
- Typical pay method:** A dropdown menu with 'Credit Transfer' selected.
- Typical annual leave year starts:** A dropdown menu with '6 April' selected.
- Typical annual leave entitlement method:** A dropdown menu with 'Set number of holiday days' selected.
- Typical annual leave days in year:** A text input field containing '28.0'.
- Typical annual leave carry-over:** A checkbox labeled 'Carry over annual leave days/hours from previous year' which is checked.
- Typical working days:** A group of checkboxes for days of the week: Mondays, Tuesdays, Wednesdays, Thursdays, and Fridays are all checked. Saturdays and Sundays are unchecked.

At the bottom of the form, there is a progress indicator with six dots, the second of which is filled. Below the progress indicator are two buttons: '< Previous' and 'Next >'. The 'Next >' button is highlighted with a blue border.

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

The screenshot shows a web browser window titled 'Automatic Enrolment Staging Date'. Below the title, a note states: '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.' The form contains a single field:

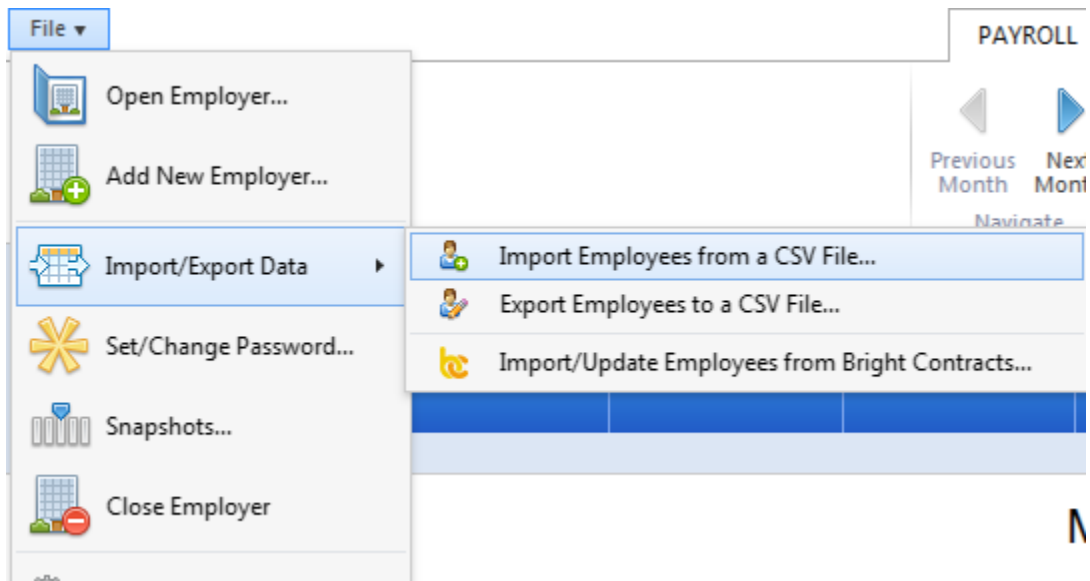
- Staging date:** A text input field with '1 June, 2015' entered and a dropdown arrow on the right.

Below the field, a note states: '(You can skip this step and enter your staging date later if required.)' At the bottom of the form, there is a progress indicator with six dots, the fourth of which is filled. Below the progress indicator are two buttons: '< Previous' and 'Next >'. The 'Next >' button is highlighted with a blue border.

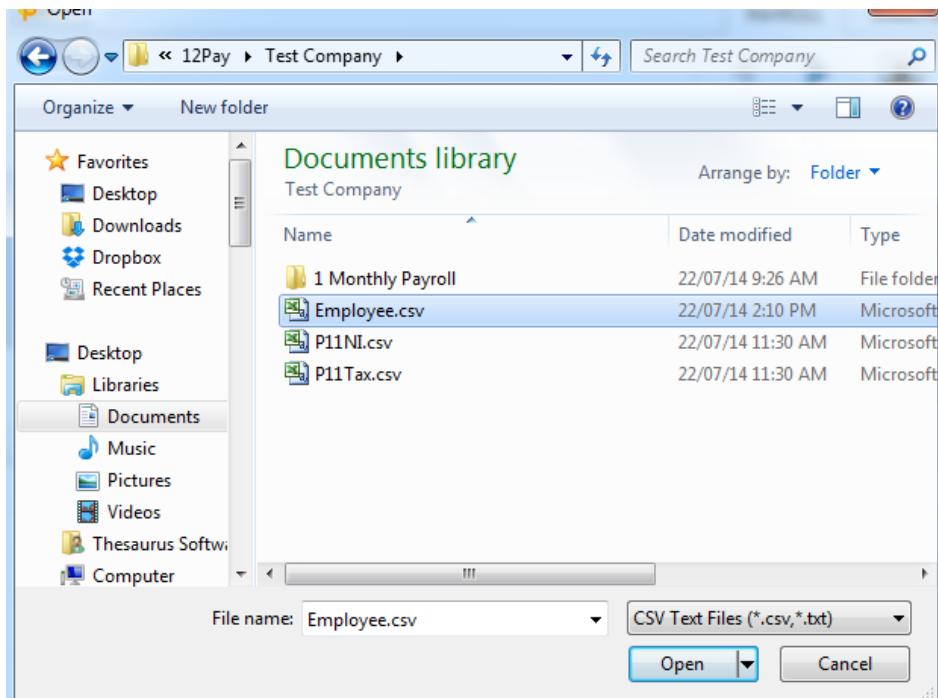
11. If required enter a **password** and when ready click **Save and Finish**. Your company will now be added to the program.

The screenshot shows a window titled "Set Up New Employer". Inside, there's a section titled "Create Your BrightPay Employer Data File". Below this title, 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 checkbox labeled "Use a password" with the text "Protect your employer data file with a password" next to it. Below the checkbox are two input fields labeled "Enter password" and "Confirm password". At the bottom of the window, there are two buttons: "< Previous" and "Save and Finish ...".

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



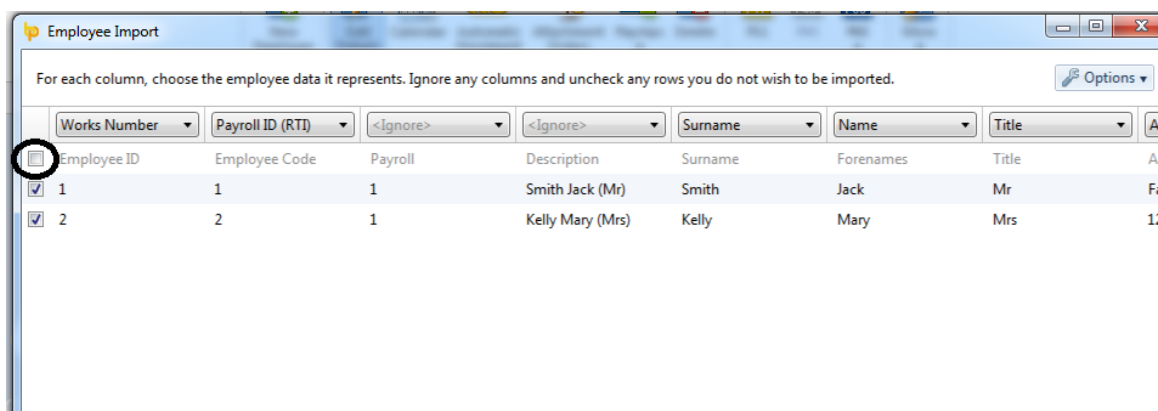
13 Browse to the location of your Employee CSV file. Once selected press **Open**



14. 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**



**15.** 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

16. 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*



