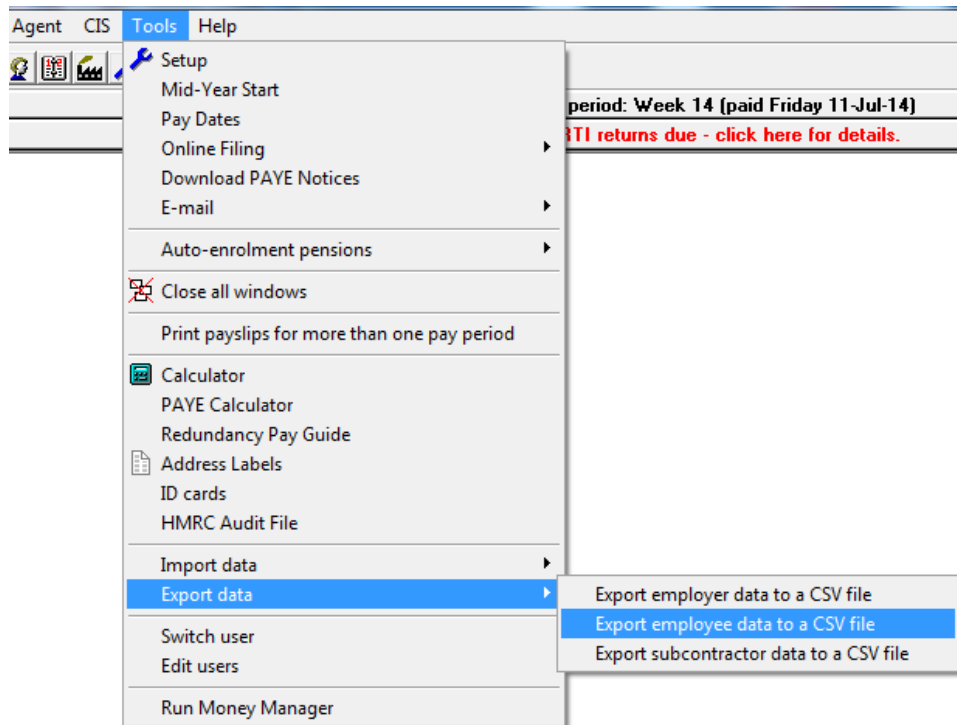
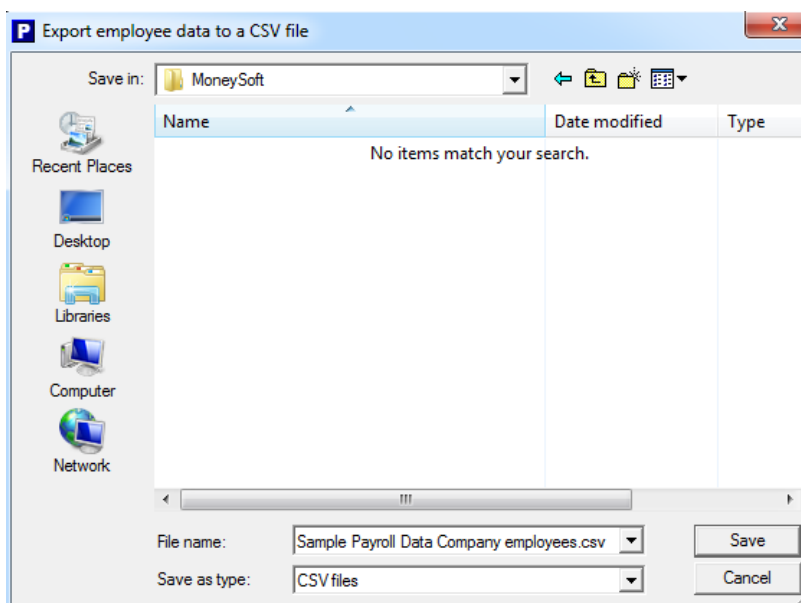


MoneySoft – Import from CSV into BrightPay

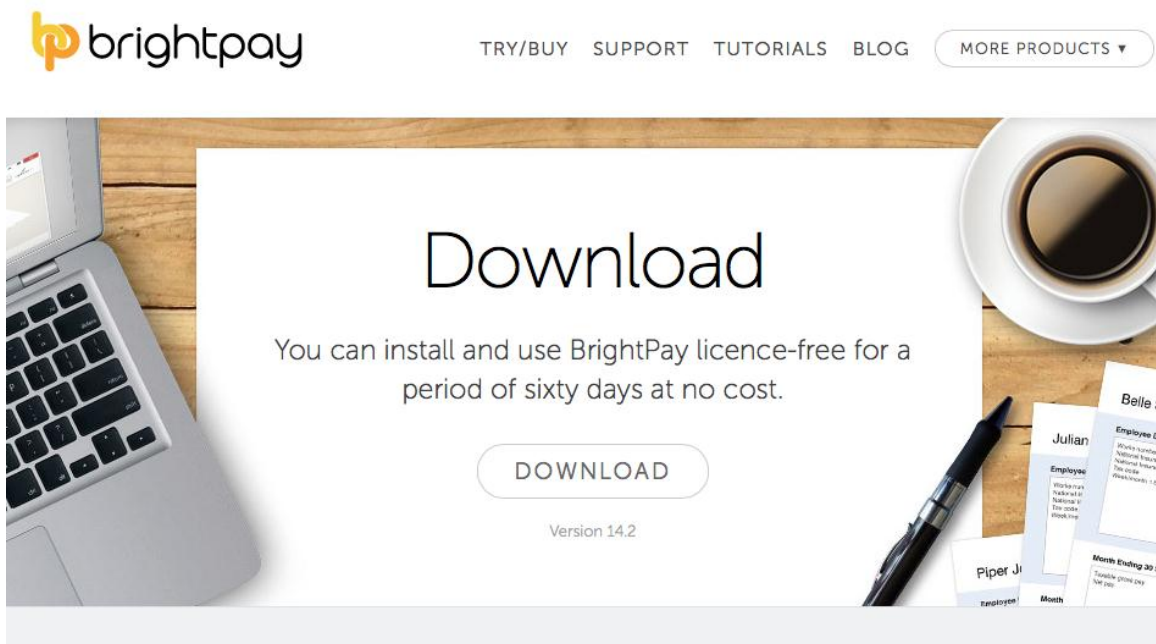
1. To export a CSV file with employee personal information from MoneySoft to **BrightPay** the first step is to go to **Tools > Export Data > Export Employee Data to a CSV file**



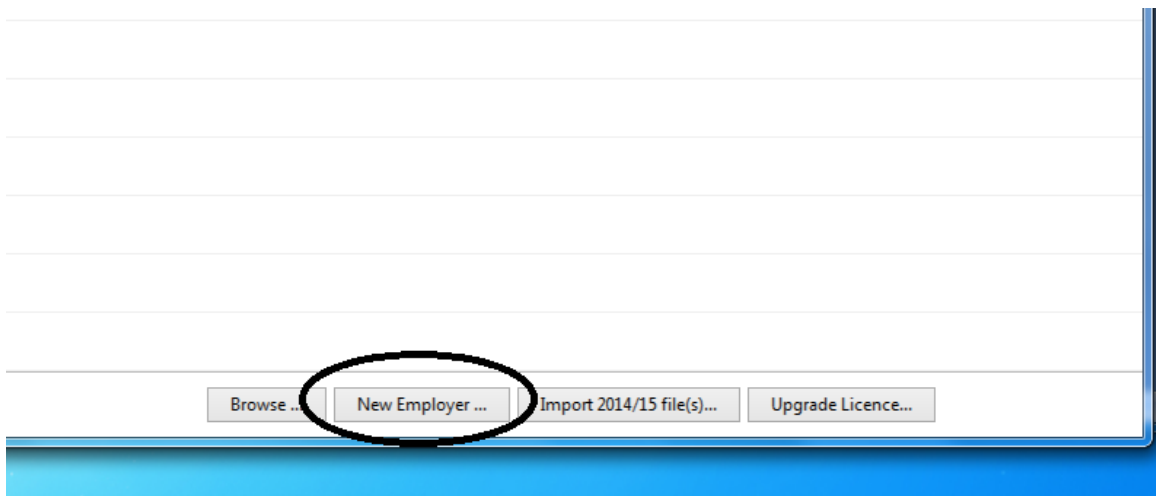
2. Select a Location for where you would like to save your Employee data
And press **Save**



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



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



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

The screenshot shows a window titled "Set Up New Employer" with a blue header bar. The main content area is divided into two sections: "Employer Name" and "Address".

Employer Name

Name: Black Heavy Metal Ltd

Address

Address: 186 Manor Road
London
Address Line 3
Address Line 4
E18 8YE Country: England

At the bottom, there are navigation buttons: "< Previous" and "Next >". Above these buttons is a progress indicator consisting of seven dots, with the fourth dot (corresponding to this step) being filled.

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

The screenshot shows the same "Set Up New Employer" window, now at Step 6: "Employer Registration".

Employer Registration

HMRC office name: [empty field]
Employer PAYE Reference: 864 / 3GNU2JO3O2
Accounts Office Reference: Optional for set up. Will be required when sending RTI submissions.

Additional

Small Employers' Relief: ☒ Employer qualifies for Small Employers' Relief
Employer Contracting-Out Number (ECON): If applicable

At the bottom, there are navigation buttons: "< Previous" and "Next >". Above these buttons is a progress indicator consisting of seven dots, with the sixth dot (corresponding to this step) being filled.

7. 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:

- 'Typical pay frequency' is a dropdown menu set to 'Monthly'.
- 'Typical pay basis' is a dropdown menu set to 'Based on a Monthly Rate / Annual Salary'.
- 'Typical pay method' is a dropdown menu set to 'Credit Transfer'.
- 'Typical annual leave year starts' is a dropdown menu set to '6 April'.
- 'Typical annual leave entitlement method' is a dropdown menu set to 'Set number of holiday days'.
- 'Typical annual leave days in year' is a text input field containing '28.0'.
- 'Typical annual leave carry-over' has a checked checkbox and the text 'Carry over annual leave days/hours from previous year'.
- 'Typical working days' has a group of checkboxes: Monday, Tuesday, Wednesday, Thursday, and Friday are all checked; Saturday and Sunday are unchecked.

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

8. 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:

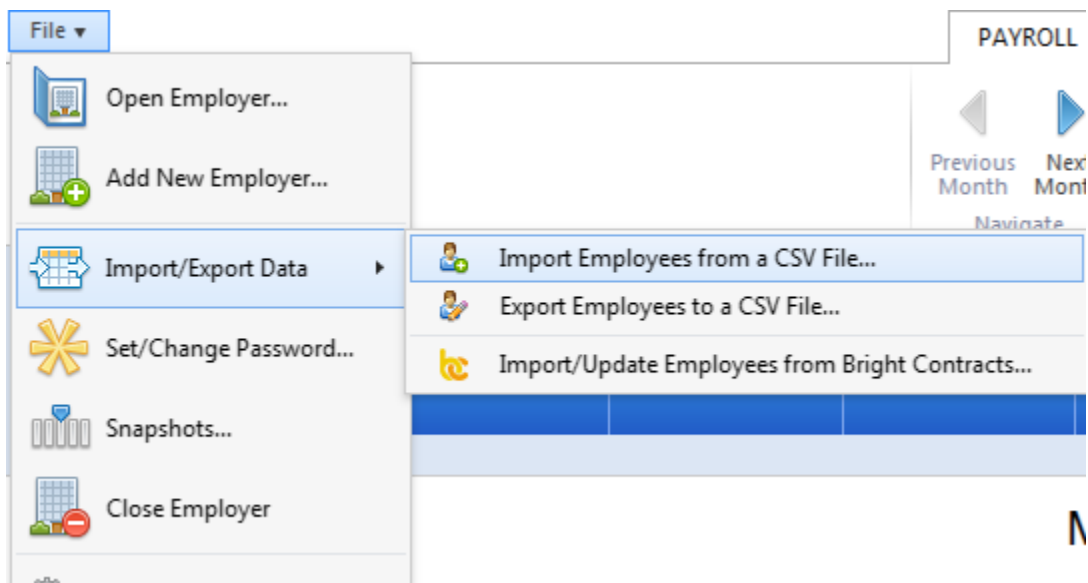
- 'Staging date' is a text input field containing '1 June, 2015'.

Below the form, there is a note: '(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 fifth of which is filled. Below the progress indicator are two buttons: '< Previous' and 'Next >'. The 'Next >' button is highlighted with a blue border.

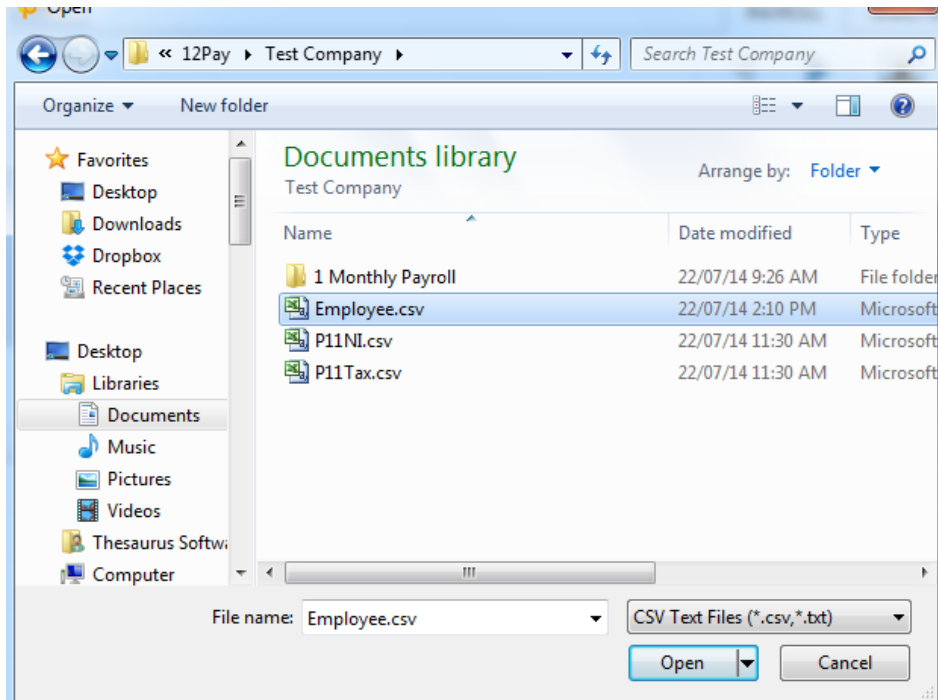
9. If required enter a **password** and when ready click **Save and Finish**. Your company will now be added to the program.

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 text input fields labeled "Enter password" and "Confirm password". At the bottom of the window, there are two buttons: "< Previous" and "Save and Finish ...".

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



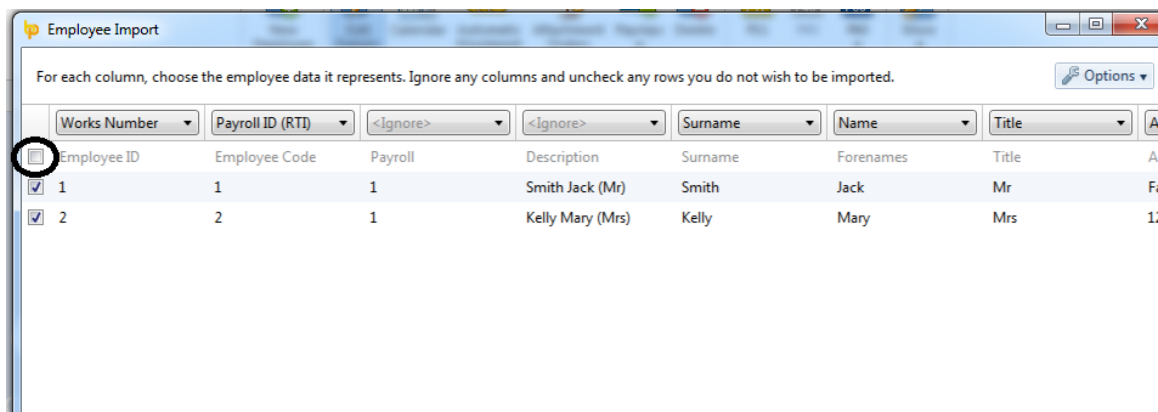
11 Browse to the location of your Employee CSV file. Once selected press **Open**



12. 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**



13. 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	

14. 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* ▼