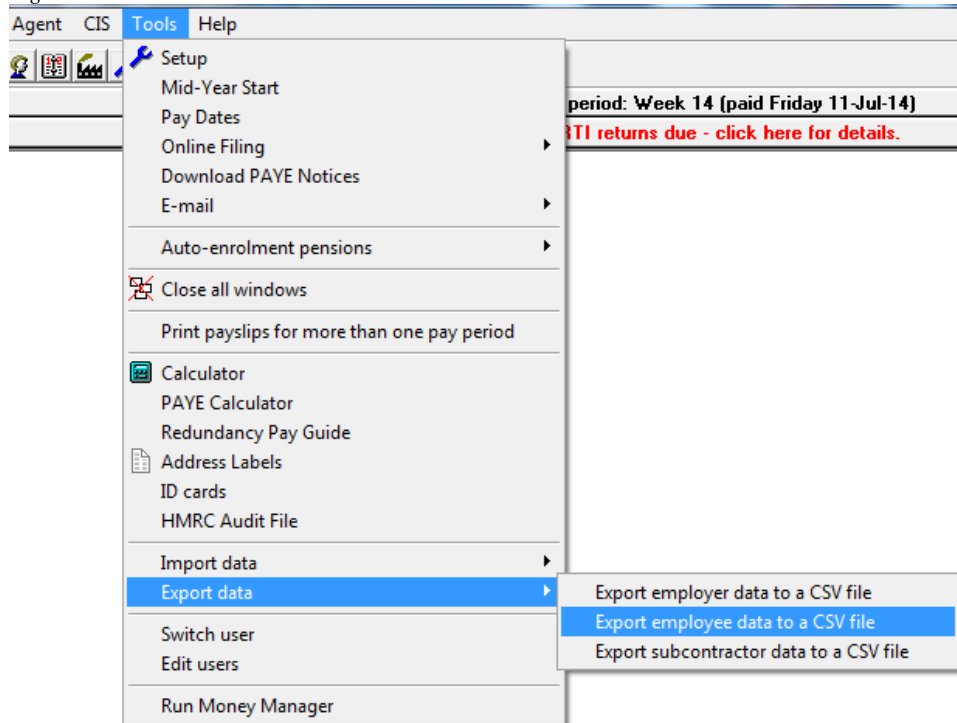


MoneySoft – Import from CSV into BrightPay

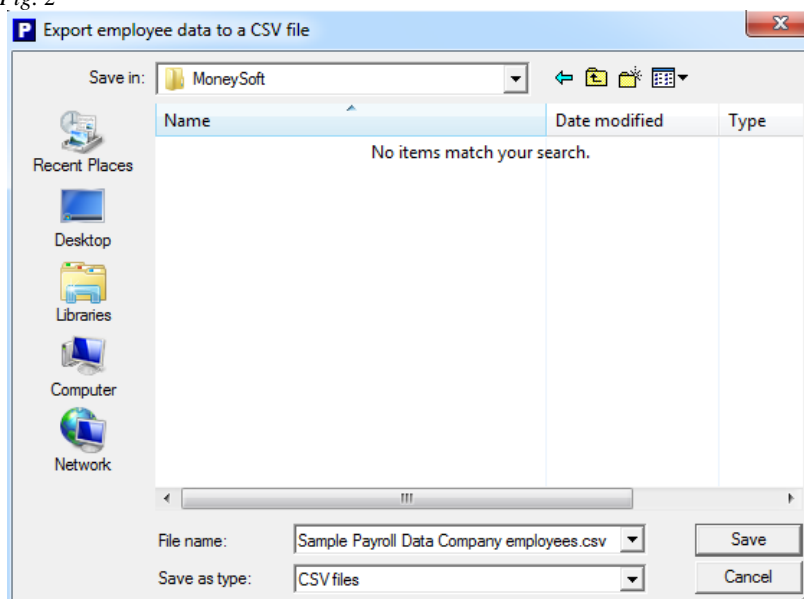
1. To export a CSV file with employee and cumulative information from MoneySoft to BrightPay the first step is to go to **Tools > Export Data > Export Employee Data to a CSV file**

Fig. 1



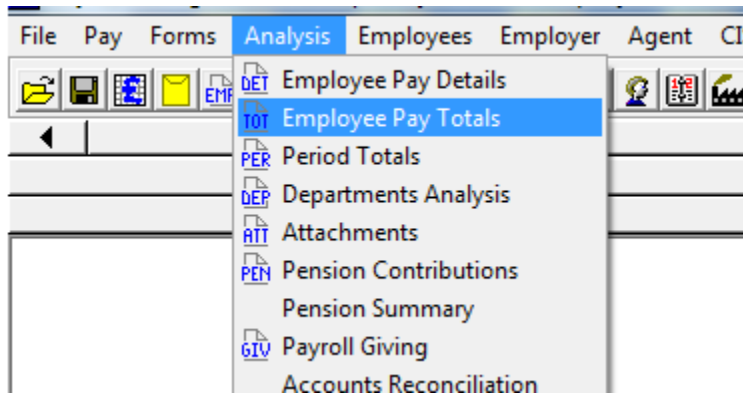
2. Select a Location for where you would like to save your Employee data
Please note the employee data will only contain personal information, you will need to export a separate file for cumulative information.

Fig. 2



- Next, if required you will need to export the **Cumulative** figures to date to a CSV file. The **Employee File** you earlier exported will then need to be merged with the cumulative CSV file. To Export the cumulative file go to **Analysis > Employee Pay Totals**

Fig. 3



- Click the **Copy to Clipboard** Button in the top right hand corner, you can then open your Employee CSV file to **Paste** in the information

Fig. 4

The screenshot shows a window titled 'Employee Pay Totals'. The toolbar includes a 'Copy to Clipboard' button (represented by a clipboard icon) which is circled in red. Below the toolbar, a dropdown menu shows 'All Employees'. The main content area displays the following information:

Sample Payroll Data Company 2014-15
Employee Pay Totals
Apr-14 to Mar-15
 All Employees, Layout: Basic


Employee	Total Payments	Tax Deducted	Employee NIC	Net Pay	Employer NIC
O B Driftwood	69,622.57	22,043.40	4,600.23	41,538.34	8,344.38
M Dumont	14,265.00	851.00	757.08	12,613.30	870.64
G B Ellington	31,720.00	4,342.00	2,488.20	20,920.68	2,397.20
W A McGonagle	12,188.00	1,667.60	1,148.34	9,334.09	1,323.05
Total	127,795.57	28,904.00	8,993.85	84,406.41	12,935.27




5. Open the **Employee CSV** file and paste in the **Cumulative** information
Right click in the last column and then left click on Paste

Fig. 5

NI Table Letter													
	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Employee	Period	NI Table Letter	Directors NI	NI Table Pay	To LEL	LEL To ET	ET To UEL	Above UEL	NIEE	NIER	Rebate EE	Rebate EF
2	1	4	A		6500	565.46	78.56	4897		357	1563.12		
3	2	4	A		7500	565.46	98.65	4589		425	1548.15		
4													
5													
6													
7													
8													
9													
10													
11													
12													
13													

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


TRY/BUY SUPPORT TUTORIALS BLOG MORE PRODUCTS ▼

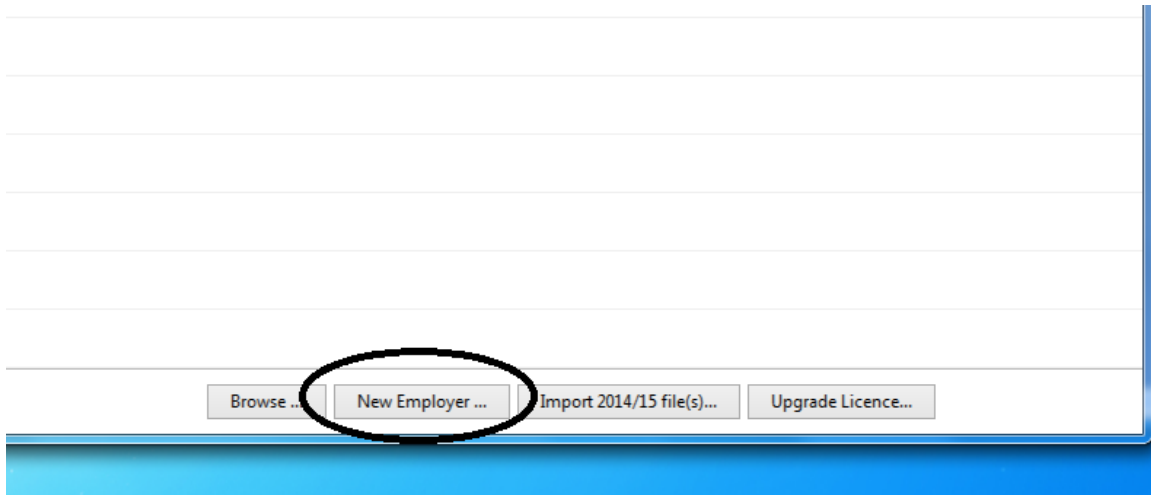
Download

You can install and use BrightPay licence-free for a period of sixty days at no cost.

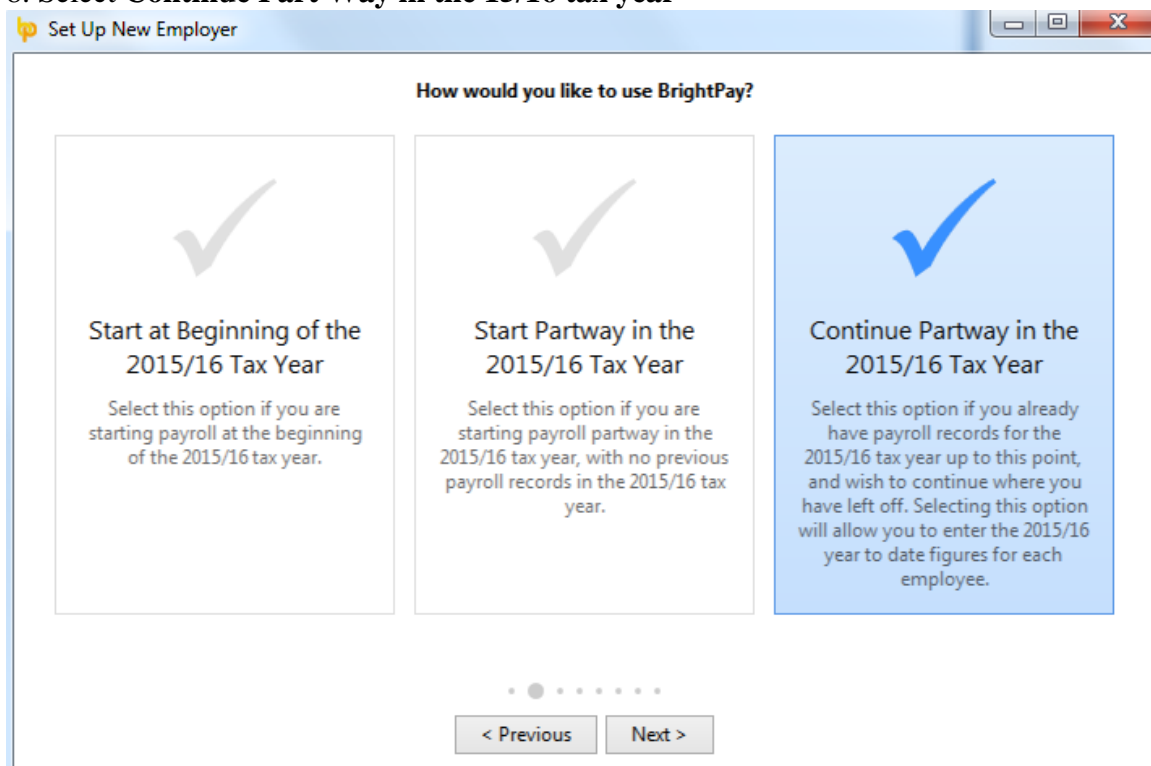
DOWNLOAD

Version 14.2

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



8. Select **Continue Part Way in the 15/16 tax year**



9. 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' (186 Manor Road), 'City' (London), 'Address Line 3' (empty), and 'Address Line 4' (empty). Below these is a 'Country' dropdown menu set to 'England'. At the bottom, there are navigation buttons: '< Previous' and 'Next >'. A progress indicator shows the first of five steps is active.

Set Up New Employer

Employer Name

Name Black Heavy Metal Ltd

Address

Address 186 Manor Road

City London

Address Line 3

Address Line 4

E18 8YE Country England

< Previous Next >

10. 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' (864 / 3GNU2JO302), and 'Accounts Office Reference' (Optional for set up. Will be required when sending RTI submissions.). Under 'Additional', there is a checkbox for 'Small Employers' Relief' which is checked, and a text box for 'Employer Contracting-Out Number (ECON)' (If applicable). At the bottom, there are navigation buttons: '< Previous' and 'Next >'. A progress indicator shows the second of five steps is active.

Set Up New Employer

Employer Registration

HMRC office name

Employer PAYE Reference 864 / 3GNU2JO302

Accounts Office Reference Optional for set up. Will be required when sending RTI submissions.

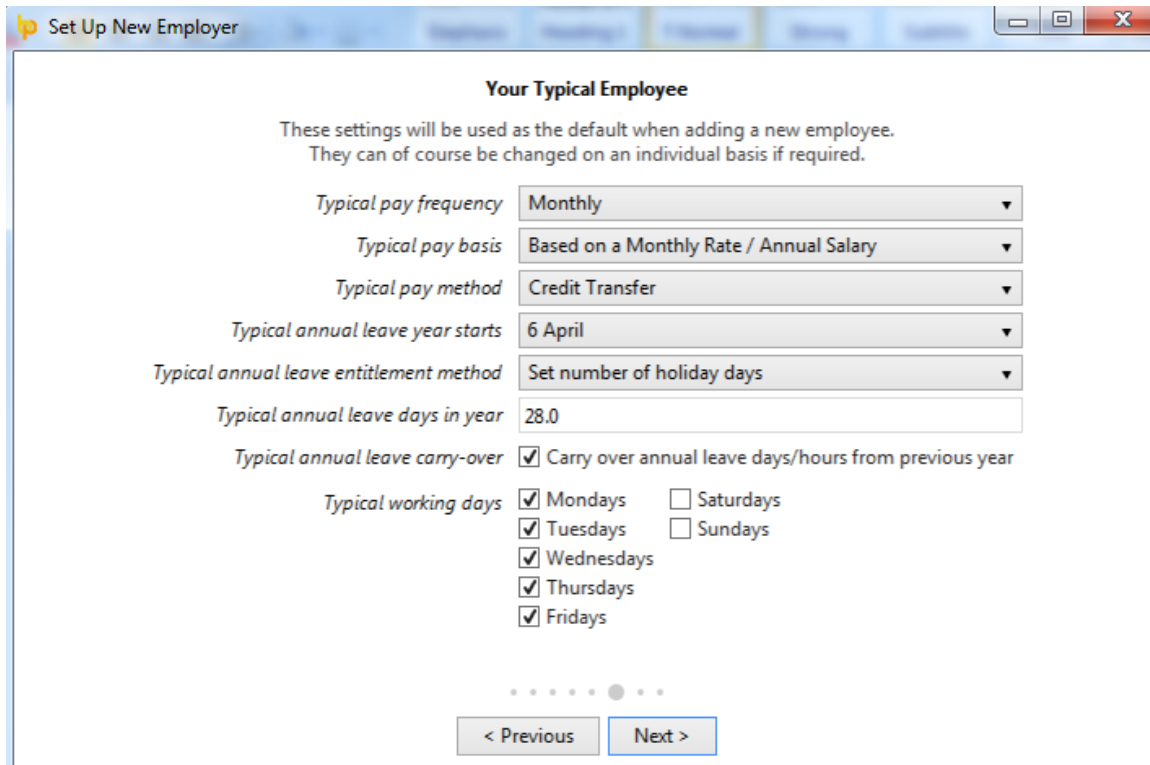
Additional

Small Employers' Relief ☒ Employer qualifies for Small Employers' Relief

Employer Contracting-Out Number (ECON) If applicable

< Previous Next >

11. 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

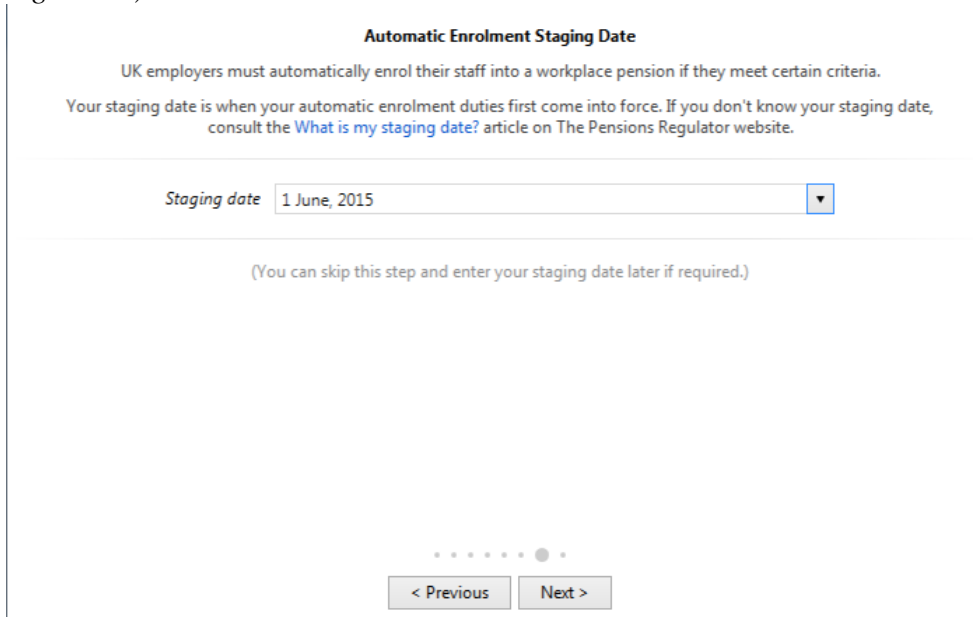
Typical annual leave carry-over: ☒ Carry over annual leave days/hours from previous year

Typical working days:

- ☒ Mondays
- ☒ Tuesdays
- ☒ Wednesdays
- ☒ Thursdays
- ☒ Fridays
- ☐ Saturdays
- ☐ Sundays

Navigation: < Previous, Next >

12. 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

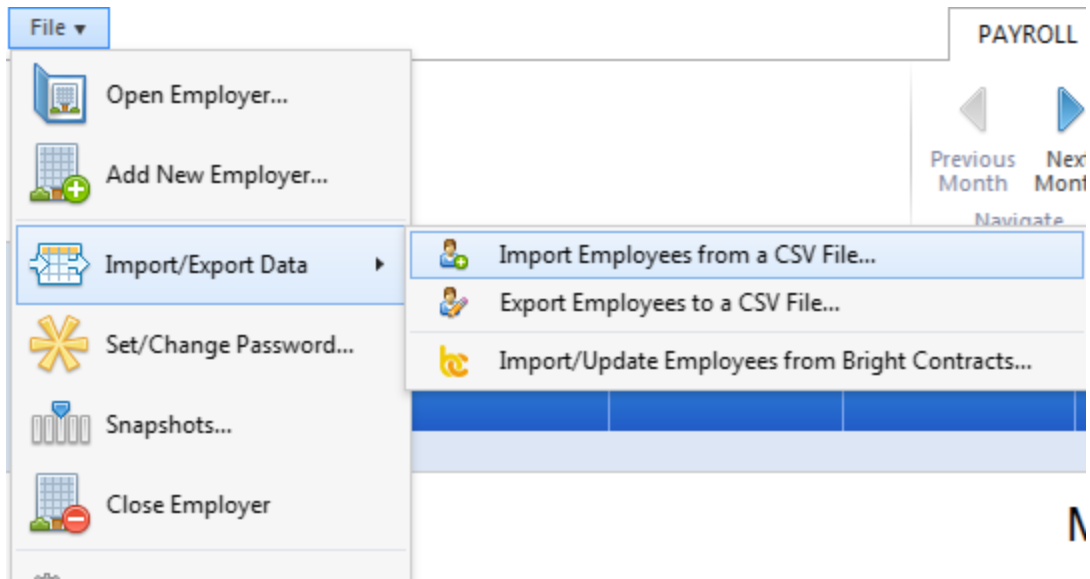
(You can skip this step and enter your staging date later if required.)

Navigation: < Previous, Next >

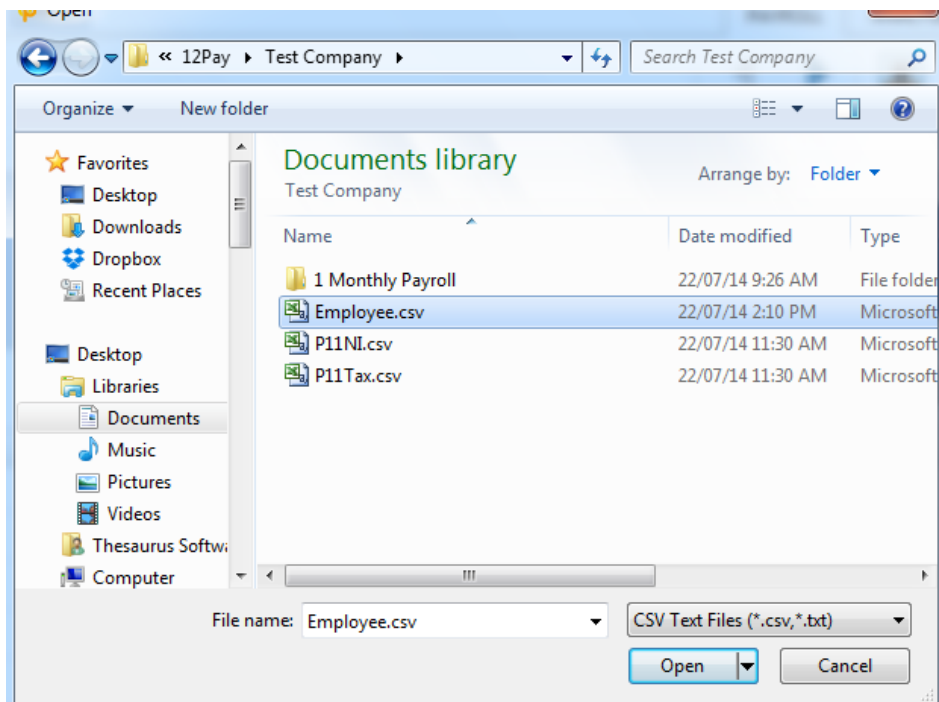
13. If required enter a **password** and when ready click **Save and Finish**. Your company will now be added to the program.

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 titled "Use a password" with a checkbox labeled "Protect your employer data file with a password". Below the checkbox are two input fields: "Enter password" and "Confirm password". At the bottom, a message says "When you're ready, click Save and Finish." and there are two buttons: "< Previous" and "Save and Finish ...".

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



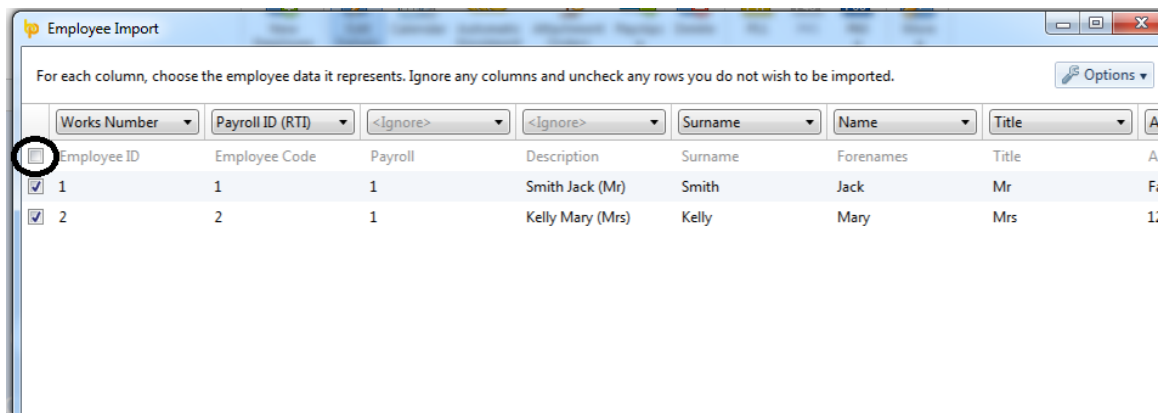
15. Browse to the location of your Employee CSV file. Once selected press **Open**



16. 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**



17. 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

19. 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

