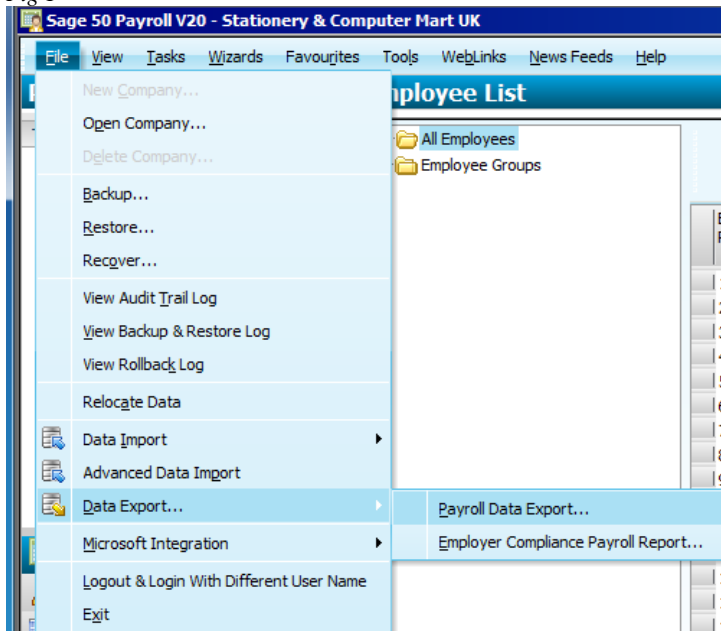


Sage 50 – Import from CSV into BrightPay (Mid Year)

1. The export needs to be done in two parts. Part 1 being the employee personal information and part 2 having the cumulative information. These files need to be merged to import the data in to BrightPay.

To export click **file > Data Export > Payroll Data Export**

Fig 1



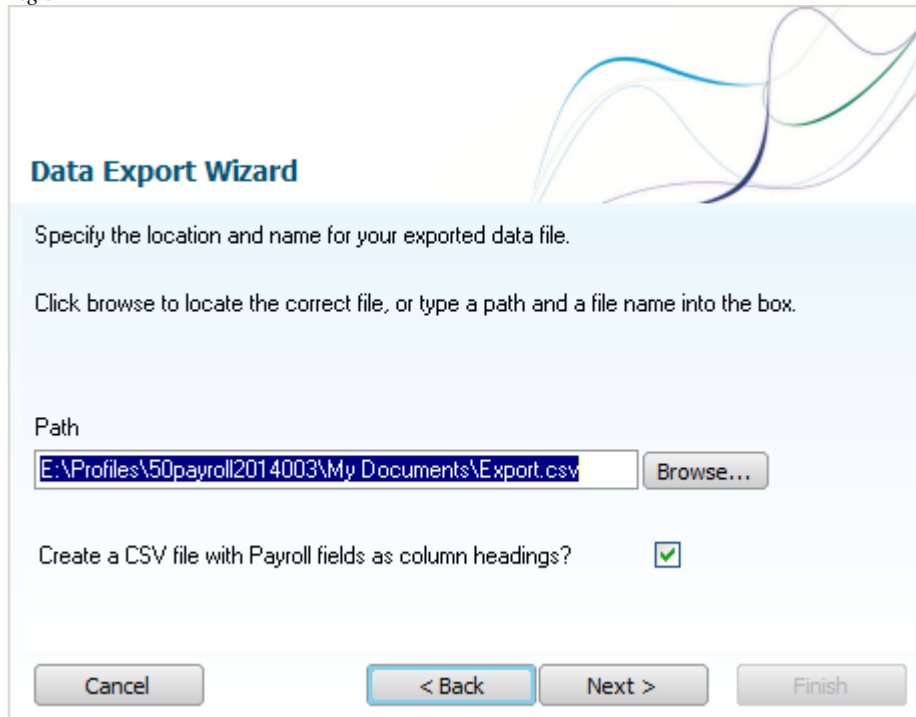
2. Next Select “Employee” Details and click “Next”

Fig 2



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

Fig 3



Data Export Wizard

Specify the location and name for your exported data file.

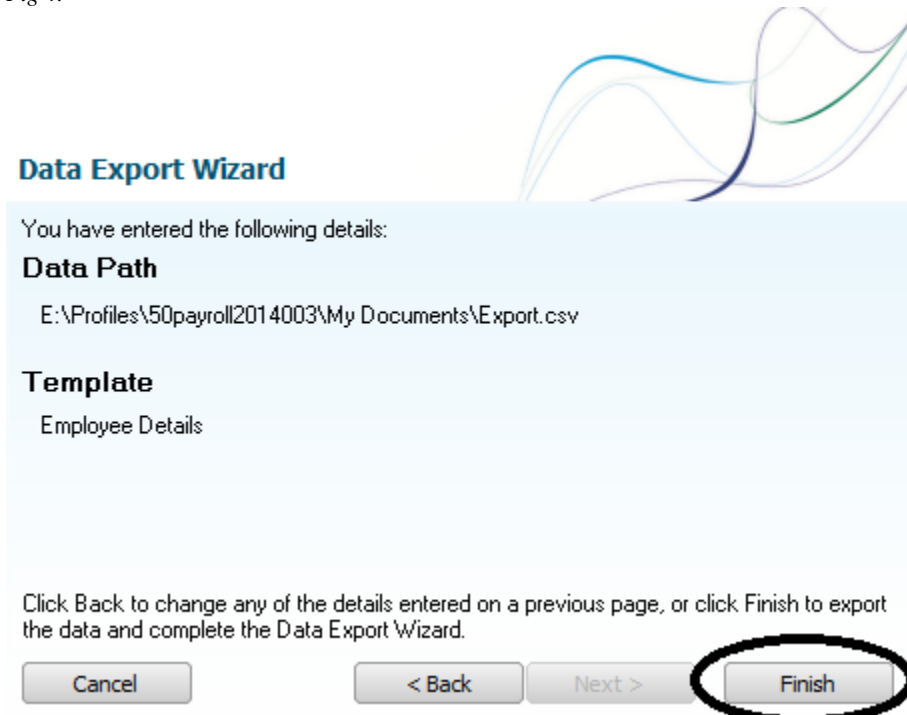
Click browse to locate the correct file, or type a path and a file name into the box.

Path

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

4. Next click “Finish”

Fig 4.



Data Export Wizard

You have entered the following details:

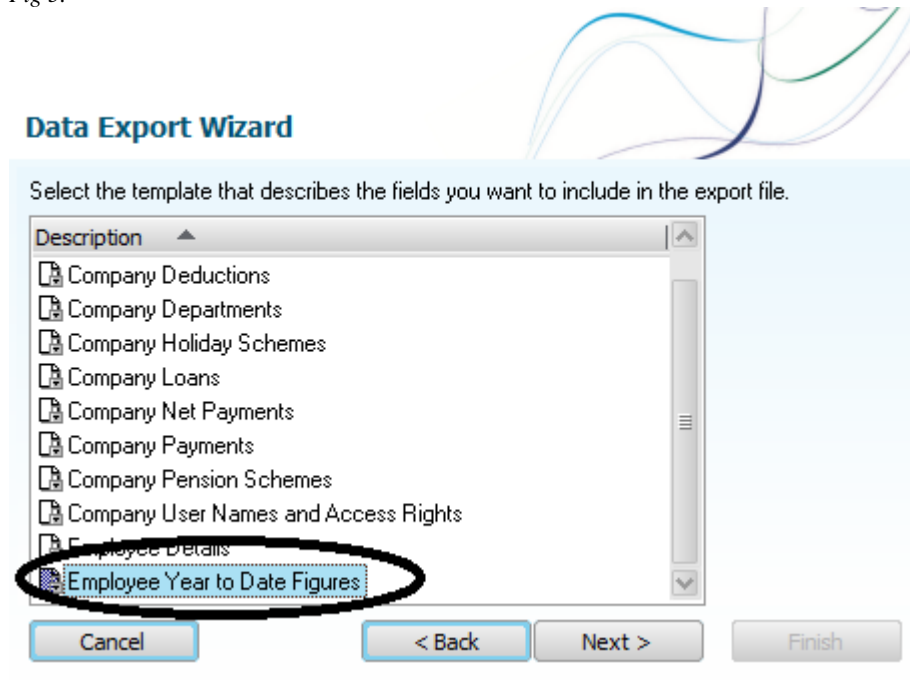
Data Path
E:\Profiles\50payroll2014003\My Documents\Export.csv

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.

5. Repeat the process to get the “**year to date**” figures. Select “**Employee year to date figures**” and click next. Follow the above steps and export your CSV file.

Fig 5.



6. Copy the columns which contain the cumulative information from the “**Year to date**” CSV file

Fig 6.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Employee P45 Gross	P45 Tax P	Total Gros	Gross Pay	Gross Pay	Total Tax	Ers NIC	TD Ees NIC	TT SSP Paid	T SSP Week	SMP Pa	
2	57	0	0	9011.7					679.2	0	0	
3	61	0	0	2849.26					0	1855.66	23.67	
4	73	0	0	11264.6					948	0	0	
5	74	0	0	13208.5	13208.5	13208.5	1757.6	1355.15	1180.8	0	0	
6	83	0	0	7044.55					441.6	0	0	
7	91	0	0	5283.8					230.4	0	0	
8	136	0	0	8224.15					492	0	0	
9	138	0	0	10566.8					864	0	0	
10	143	0	0	7885.2					415.2	0	0	
11	149	0	0	6645.64					367.68	66.34	0.75	

8. Paste the required columns in to the end of the Employee.CSV file.

Fig 8.

BN	BO	BP	BQ	BR	BS	BT	BU	BV	BW	BX	BY	BZ	CA
Bank Addr	Bank Addr	Bank Addr	Bank Addr	Bank Post	Bank Tele	Employee	P45 Gross	P45 Tax P	Total Gros	Gross Pay	Gross Pay	Total Tax	Ers NIC TD
						57	0	0	9011.7	9011.7	9011.7	918.2	778.3
						61	0	0	2849.26	1923.47	1923.47	0	0
						73	0	0	11264.6	11264.6	11264.6	1368.8	1087.45
						74	0	0	13208.5	13208.5	13208.5	1757.6	1355.15
						83	0	0	7044.55	7044.55	7044.55	524.8	505.1
						91	0	0	5283.8	5283.8	5283.8	172.6	262.2
Womersdale				WN8 6GG		136	0	0	8224.15	7464.99	7464.99	608.8	563.02
Womersdale				WN8 6GG		138	0	0	10566.8	10566.8	10566.8	1229.2	990.85
						143	0	0	7885.2	6813.2	6813.2	478.4	474.72
						149	0	0	6645.64	6427.47	6427.47	401.4	420.07
						180	0	0	9080.54	9080.54	9080.54	932	786.59
						189	0	0	5283.8	3825.15	3825.15	0	60.7

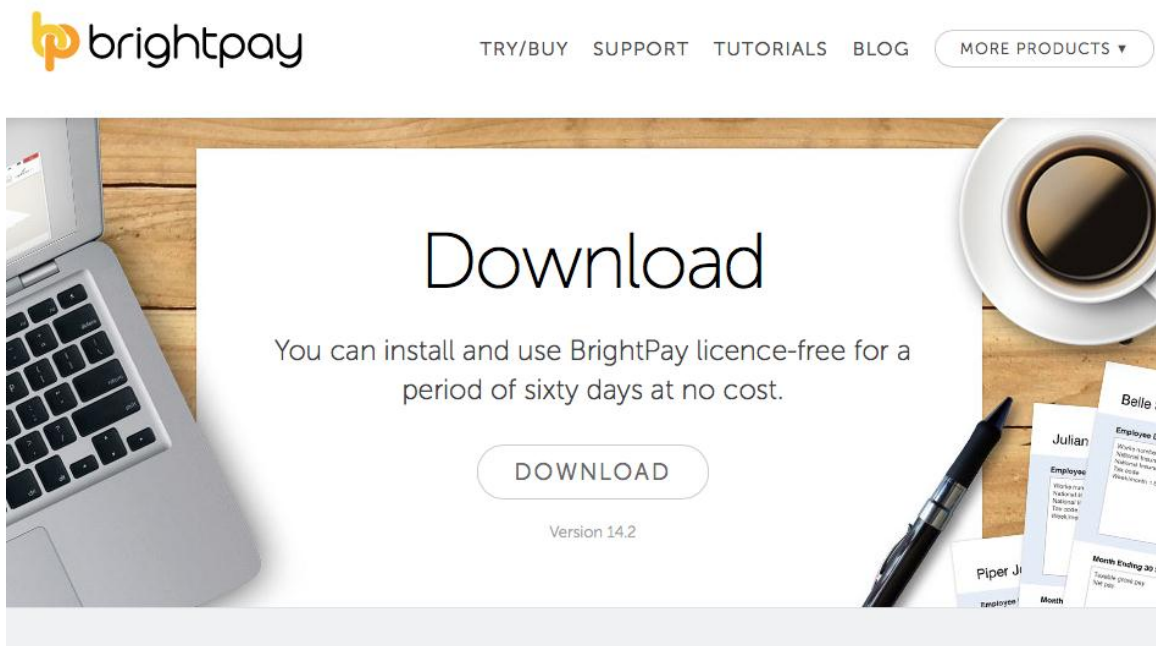
9. BrightPay requires the “Total NI amount” be imported. This field is not on the sage CSV file. You can add in a new column and add the ER and EE NIC amount together to get a “Total NI Column.

BY	BZ	CA	CB	CC	CD	CE	CF
Gross Pay	Total Tax	Ers NIC TD	Ees NIC TD	Total NIC	SSP Paid T	SSP Week	SMP Pa
9011.7	918.2	778.3	679.2	=sum(CA2:CB2		0	
1923.47	0	0	0	SUM(number1, [number2], ...)		7	
11264.6	1368.8	1087.45	948		0	0	
13208.5	1757.6	1355.15	1180.8		0	0	
7044.55	524.8	505.1	441.6		0	0	
5283.8	172.6	262.2	230.4		0	0	
7464.99	608.8	563.02	492		0	0	

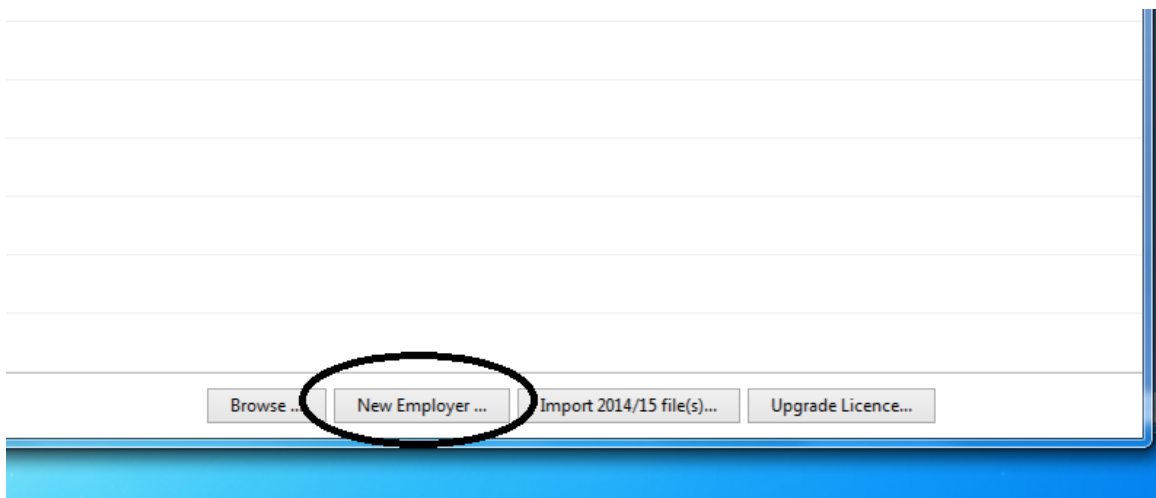
10. Once the new column is added an the totals amounts show you can now save the file and download BrightPay.

BY	BZ	CA	CB	CC	CD	CE	CF
Gross Pay	Total Tax	Ers NIC TD	Ees NIC TD	Total NIC	SSP Paid T	SSP Week	SMP Pa
9011.7	918.2	778.3	679.2	1457.5	0	0	
1923.47	0	0		0	1855.66	23.67	
11264.6	1368.8	1087.45	948	2035.45	0	0	
13208.5	1757.6	1355.15	1180.8	2535.95	0	0	
7044.55	524.8	505.1	441.6	946.7	0	0	
5283.8	172.6	262.2	230.4	492.6	0	0	
7464.99	608.8	563.02	492	1055.02	0	0	
10566.8	1229.2	990.85	861	1854.85	0	0	
7885.2	478.4	474.72	415.2	889.92	0	0	
6645.64	401.4	420.07	367.63	787.75	66.34	0.75	
9080.54		786.59	606.41	1457.80	0	0	

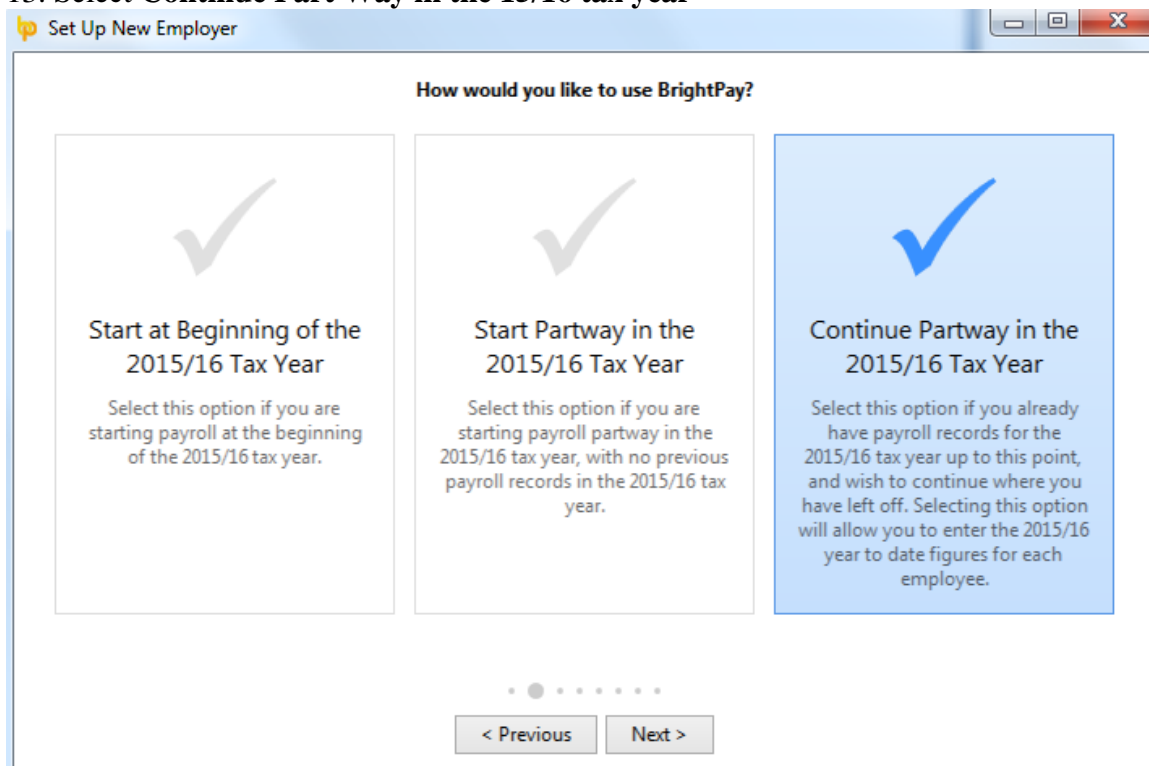
11. Next you will need to Download and Install **BrightPay** from our website
www.brightpay.co.uk



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




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




Set Up New Employer

How would you like to use BrightPay?




Start at Beginning of the 2015/16 Tax Year

Select this option if you are starting payroll at the beginning of the 2015/16 tax year.



Start Partway in the 2015/16 Tax Year

Select this option if you are starting payroll partway in the 2015/16 tax year, with no previous payroll records in the 2015/16 tax year.



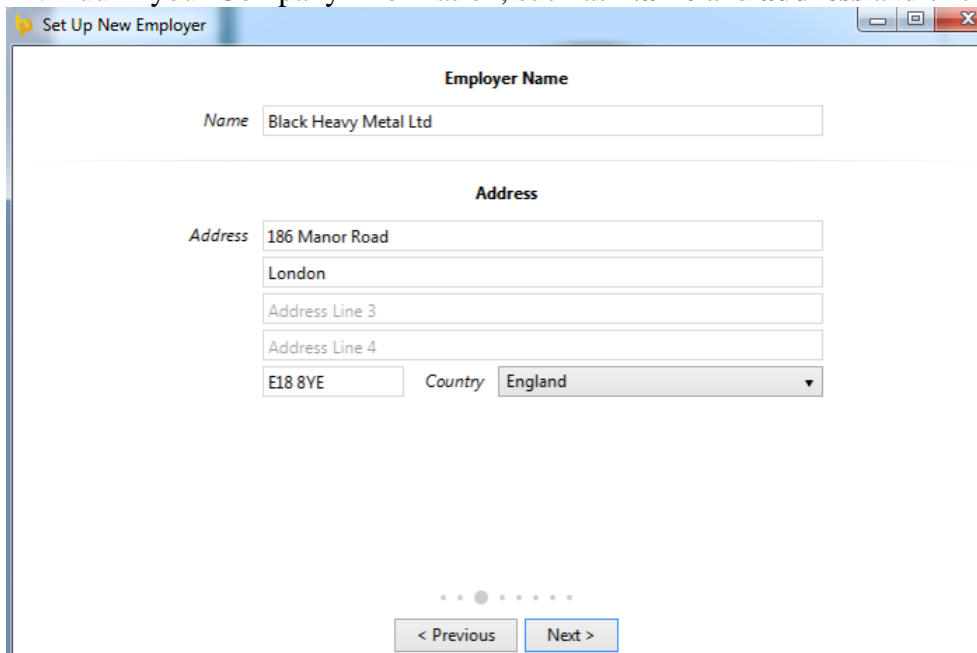
Continue Partway in the 2015/16 Tax Year

Select this option if you already have payroll records for the 2015/16 tax year up to this point, and wish to continue where you have left off. Selecting this option will allow you to enter the 2015/16 year to date figures for each employee.

• • • • •

< Previous Next >

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



Set Up New Employer

Employer Name

Name

Address

Address

 Country

• • • • •

< Previous Next >

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

The screenshot shows a window titled "Set Up New Employer" with a sub-header "Employer Registration". It contains three input fields: "HMRC office name" (empty), "Employer PAYE Reference" (containing "864" and "3GNU2JO3O2" separated by a slash), and "Accounts Office Reference" (with a placeholder text: "Optional for set up. Will be required when sending RTI submissions."). Below these is an "Additional" section with a checkbox for "Small Employers' Relief" (checked) and a text field for "Employer Contracting-Out Number (ECON)" (containing "If applicable"). At the bottom are navigation buttons "< Previous" and "Next >".

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

The screenshot shows the same window with a sub-header "Your Typical Employee". It includes 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 are several settings: "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). Under "Typical working days", there are checkboxes for Mondays through Fridays (all checked) and Saturdays and Sundays (unchecked). Navigation buttons "< Previous" and "Next >" are at the bottom.

17. 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: 8 dots, 7th dot highlighted.

< Previous Next >

18. 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

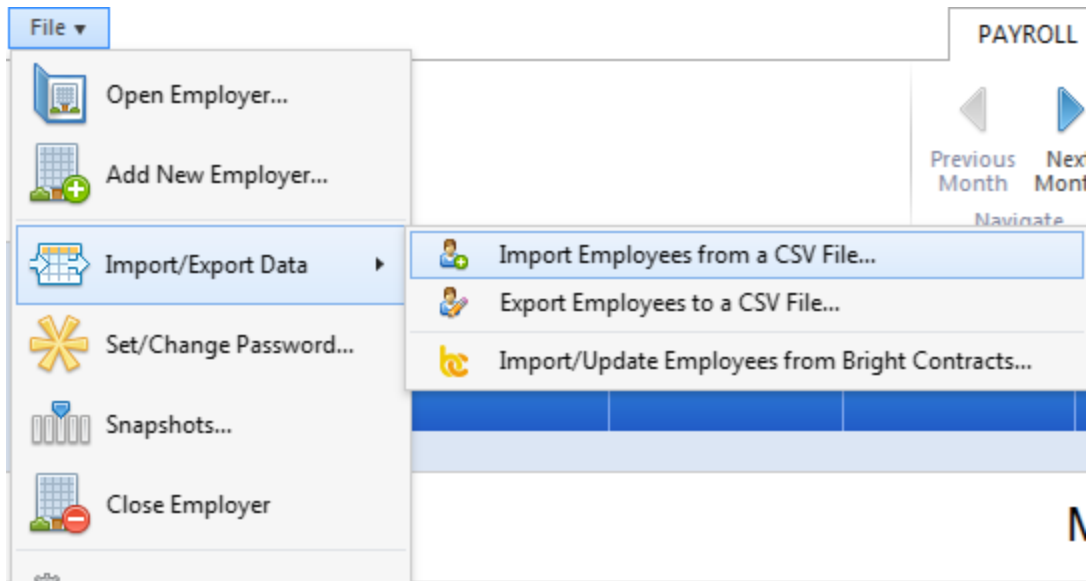
Confirm password

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

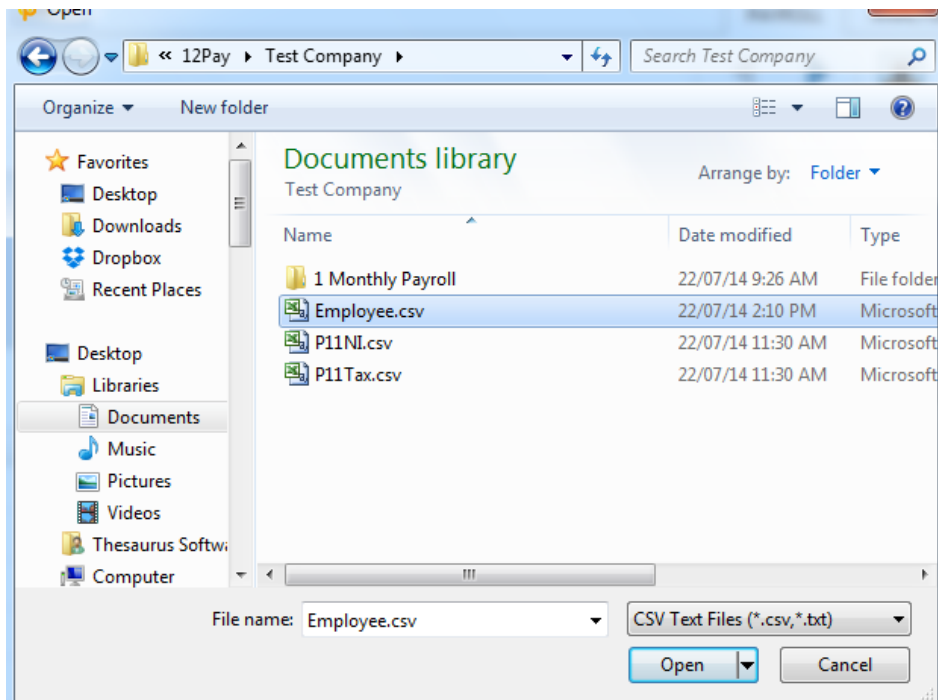
Progress indicator: 8 dots, 8th dot highlighted.

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

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



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




20. 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"/>	Employee ID	Employee Code	Payroll	Description	Surname	Forenames	Title
<input checked="" type="checkbox"/>	1	1	1	Smith Jack (Mr)	Smith	Jack	Mr
<input checked="" type="checkbox"/>	2	2	1	Kelly Mary (Mrs)	Kelly	Mary	Mrs


21. 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.


 Brenden Stewart


 Dominique Wilkins


 Emma Schneider

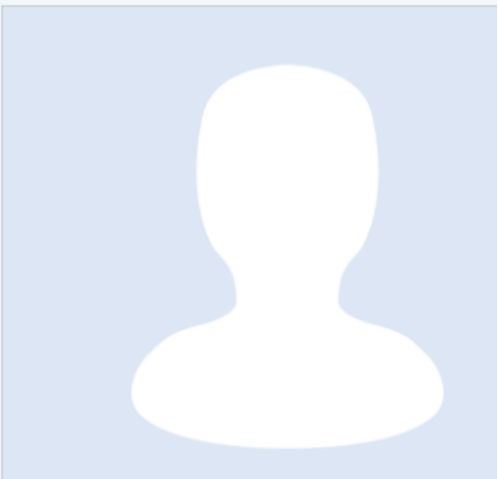
 Jael Hoover

 Jolene Mercado

 Kay Stanley

 Maya Stafford

 Rhonda Lott



22. 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 30 May, 2015 ▼
for the month ending on the Last Day ▼ *of* May 2015 ▼

[Preview...](#) [Continue >](#)