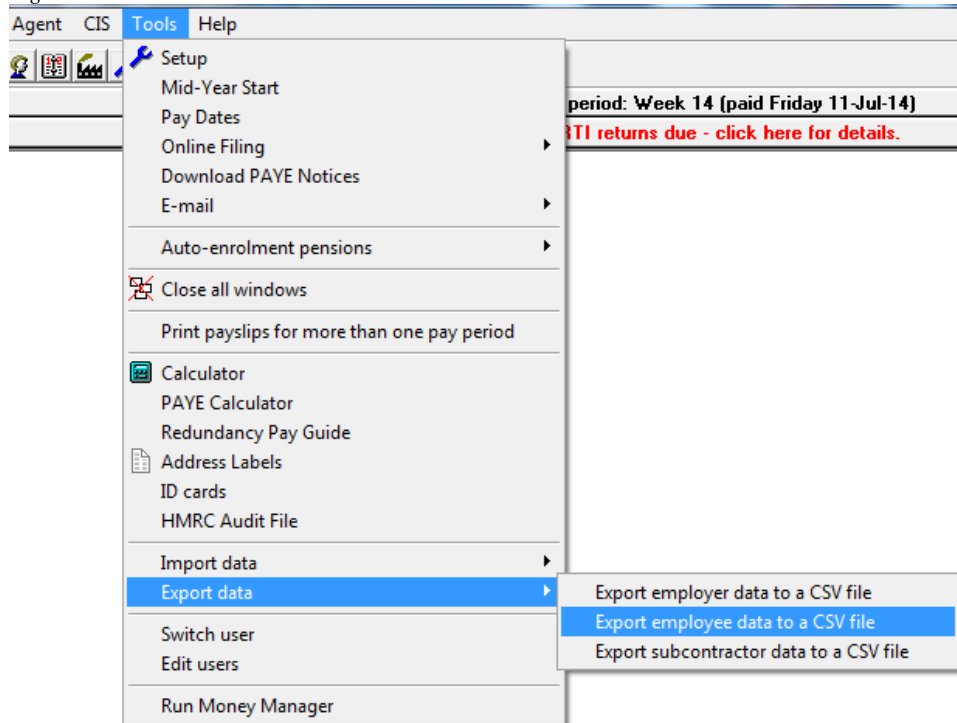# MoneySoft – Import from CSV into BrightPay

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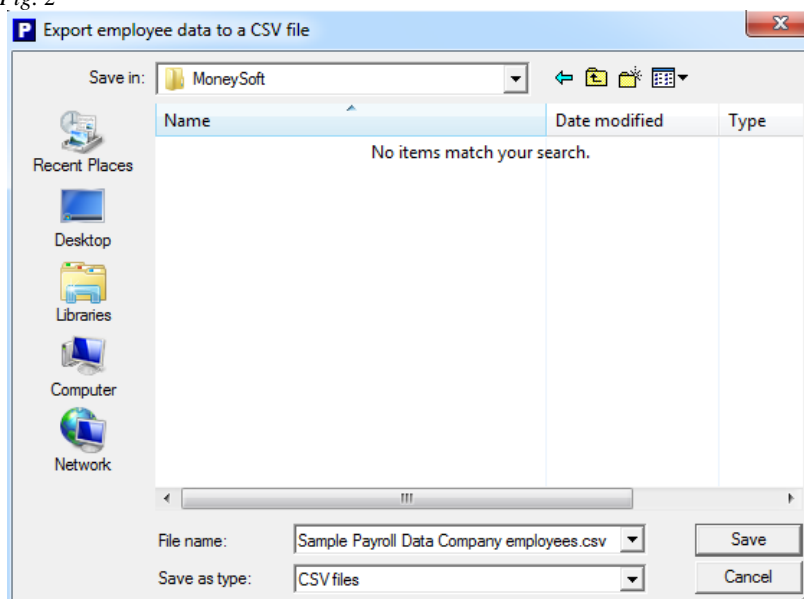
3. Next, if required you will need to export the **Cumulative** figures to date to a CSV file. The **Employee File** you earlier exported will then need to be merged with the cumulative CSV file. To Export the cumulative file go to **Analysis > Employee Pay Totals**

*Fig. 3*
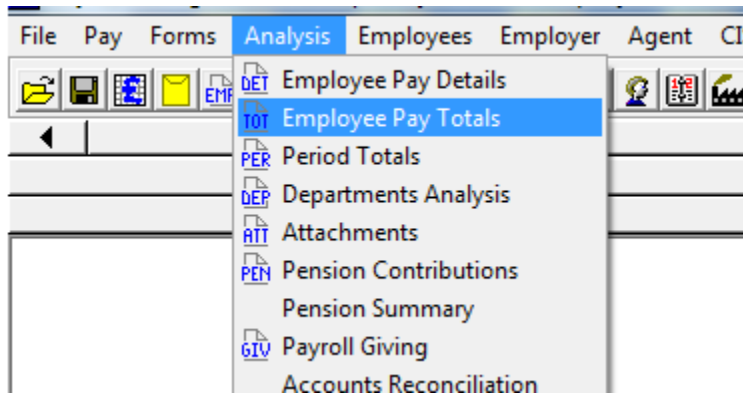


4. Click the **Copy to Clipboard** Button in the top right hand corner, you can then open your Employee CSV file to **Paste** in the information

*Fig. 4*



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*

|  | ▼ | *fx* NI Table Letter | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
|  | A | B | C | D | E | F | G | H | I | J | K | L | M |
| 1 | Employee | Period | NI Table Le | Directors NI | N lable 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
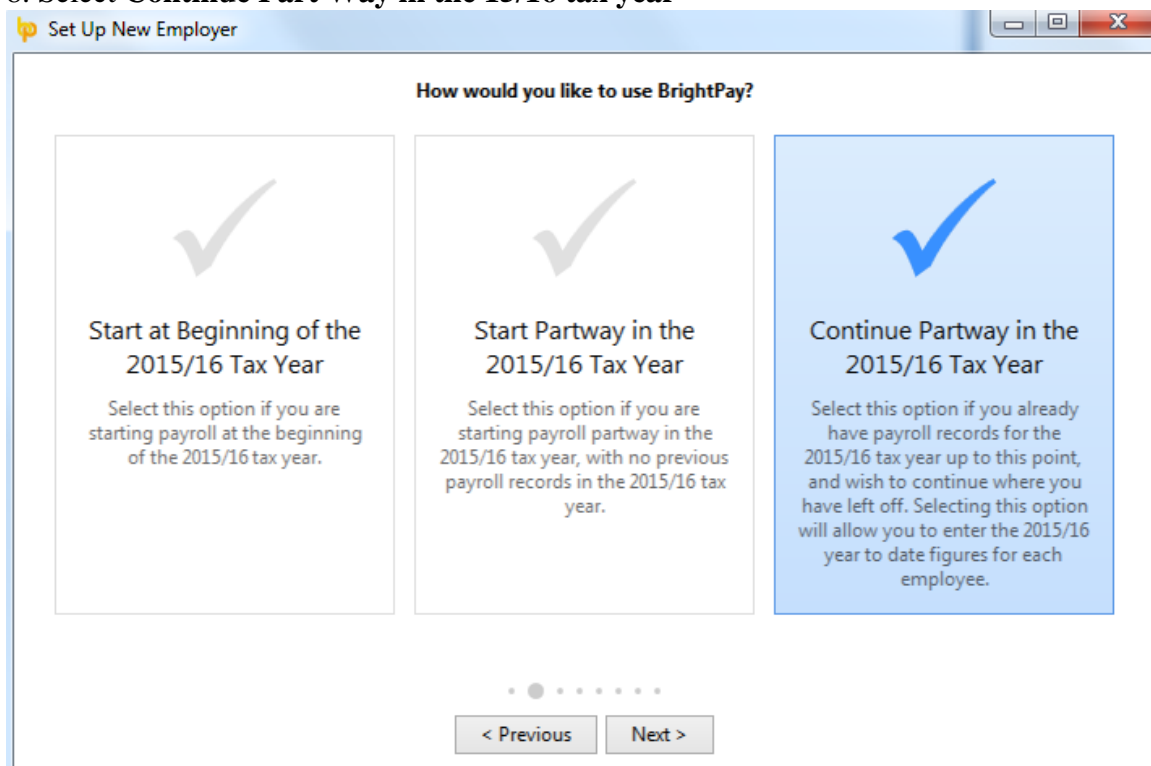www.brightpay.co.uk

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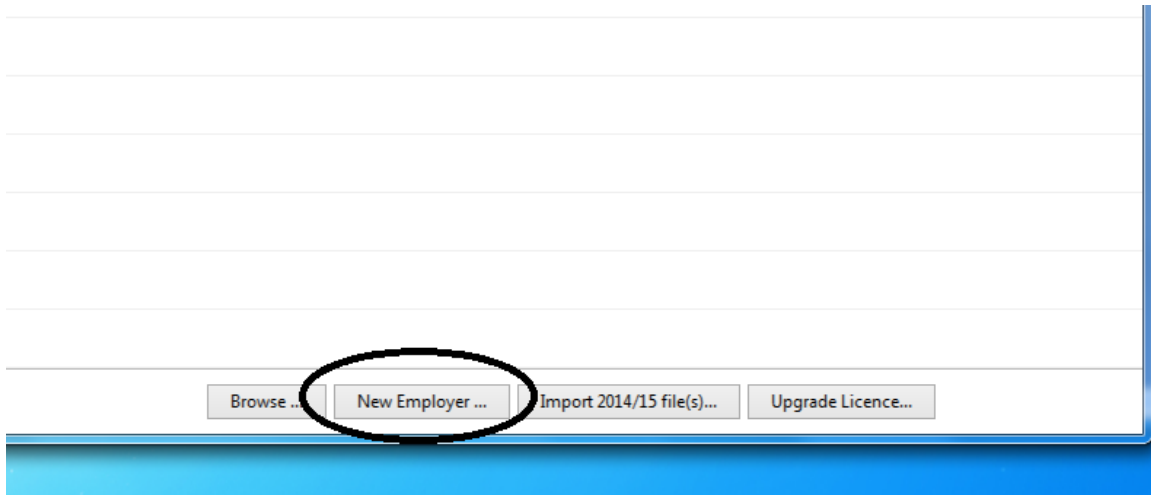


8. Select **Continue Part Way in the 15/16 tax year**

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

**Set Up New Employer**

**Employer Name**

Name | Black Heavy Metal Ltd

**Address**

Address | 186 Manor Road
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.

**Set Up New Employer**

**Employer Registration**

HMRC office name |
Employer PAYE Reference | 864 | / | 3GNU2JO3O2
Accounts Office Reference | Optional for set up. Will be required when sending RTI submissions.
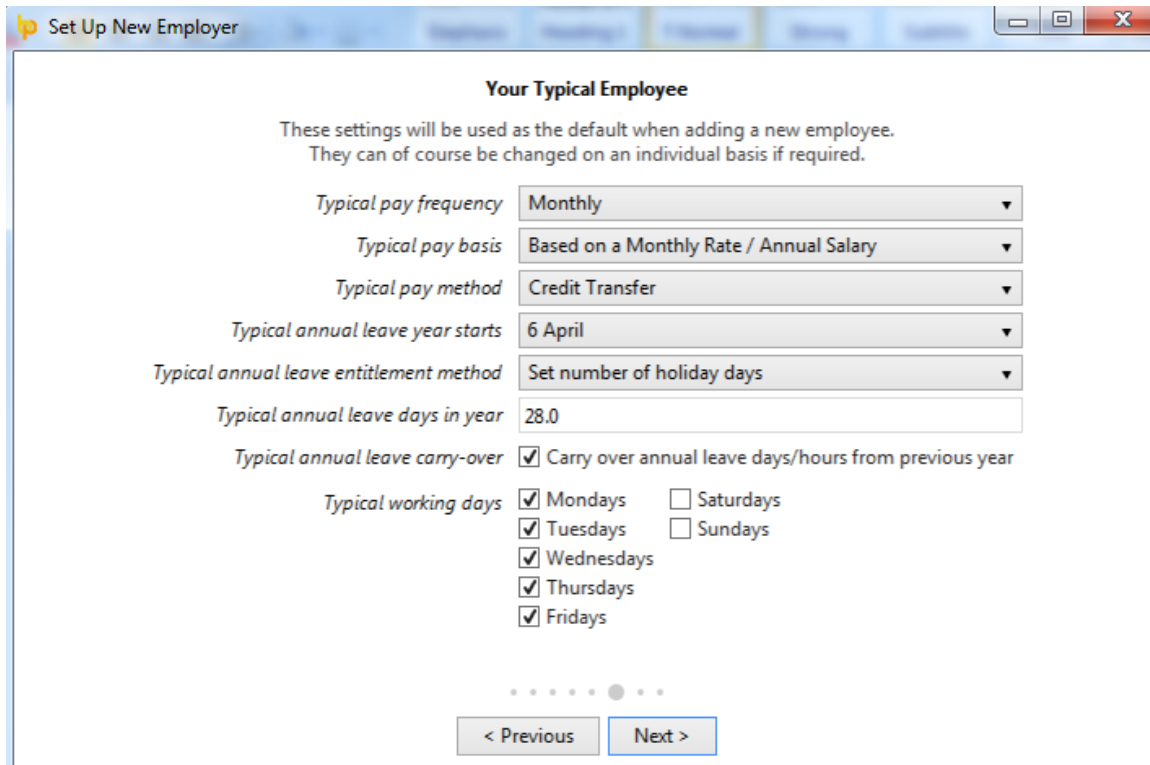
**Additional**

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

< Previous | Next >

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



12. If Applicable enter your **Staging Date**, *(This would be sent to you by the pension regulator.)*
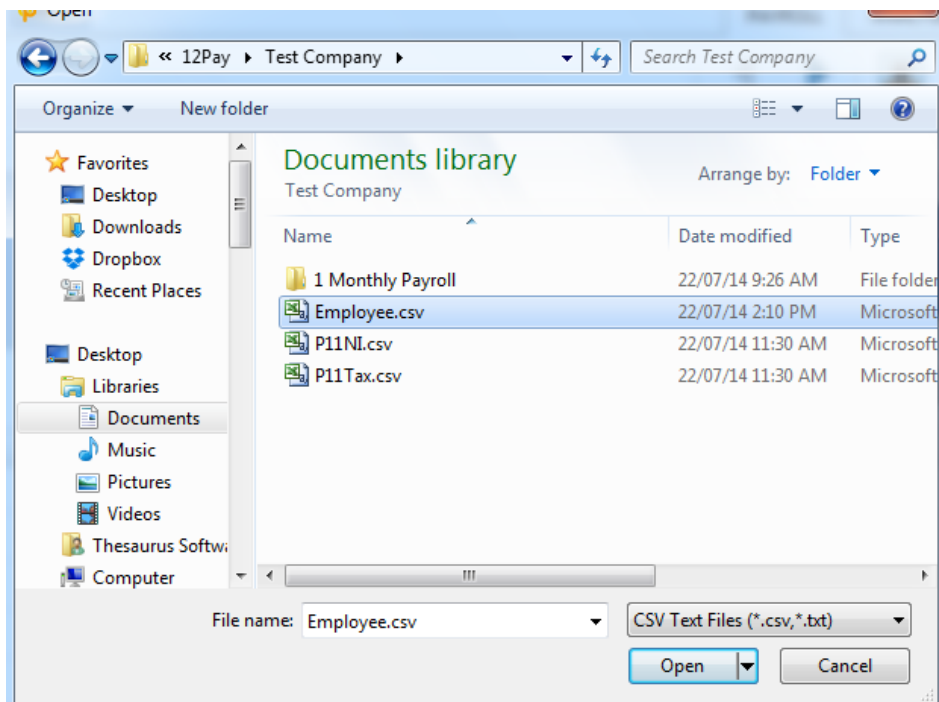
13. If required enter a **password** and when ready click **Save and Finish.** Your company will now be added to the program.



14. Open your company, to import your Employees go to **File > Import/ Export Data > Import from a CSV file**
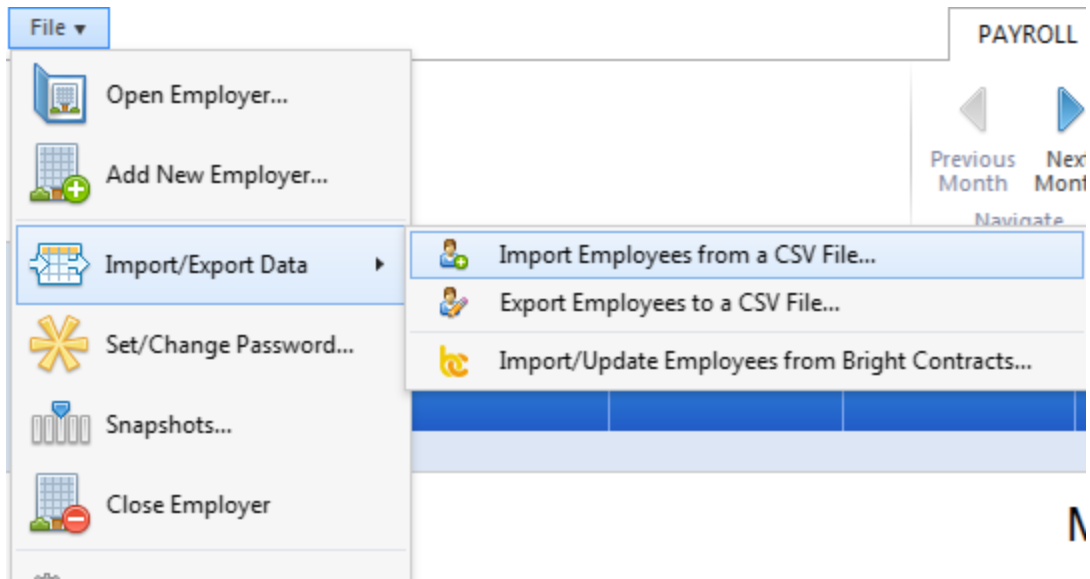
**15**. Browse to the location of your Employee CSV file. Once selected press **Open**



**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**
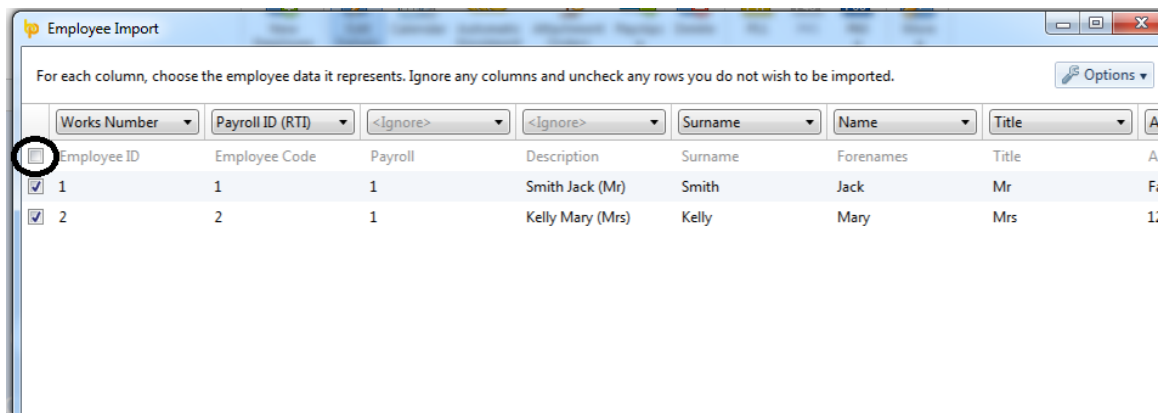
**17.** You will now see all your employee personal information. To view go in to the
**Employee** Tab. Your employees will be listed on the left hand side.

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   30 May, 2015 ▾

for the month ending on the   Last Day ▾   of   May 2015 ▾

Preview...    Continue >