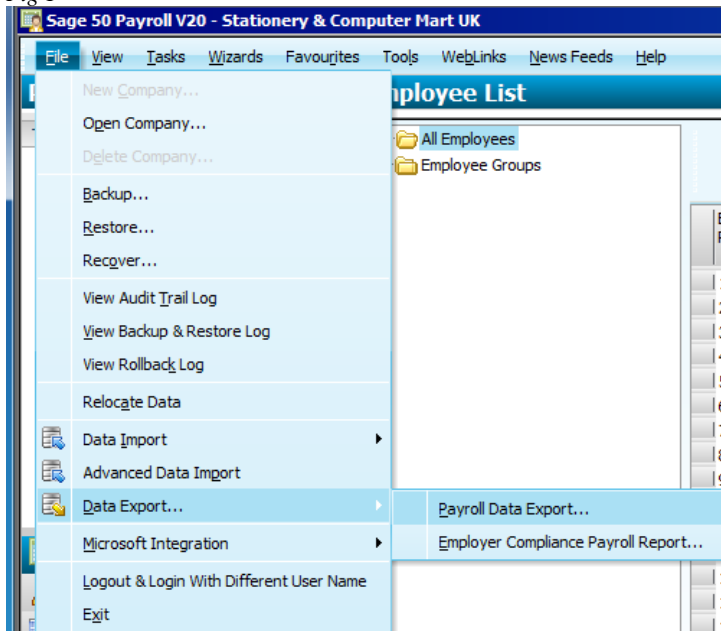# *Sage 50* – **Import from CSV into BrightPay (Mid Year)**

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**
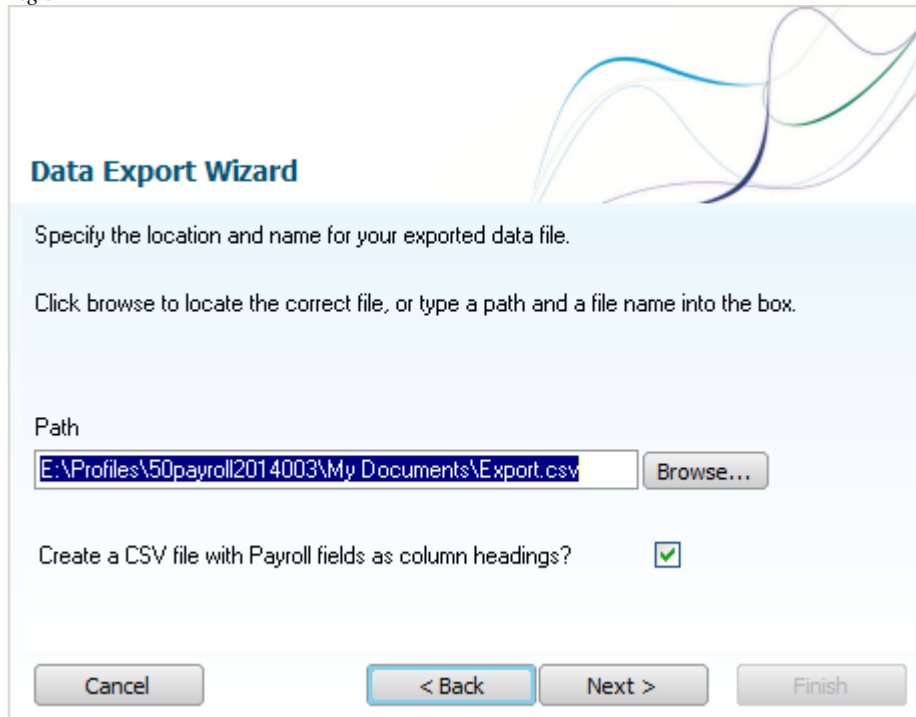
Fig 1

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

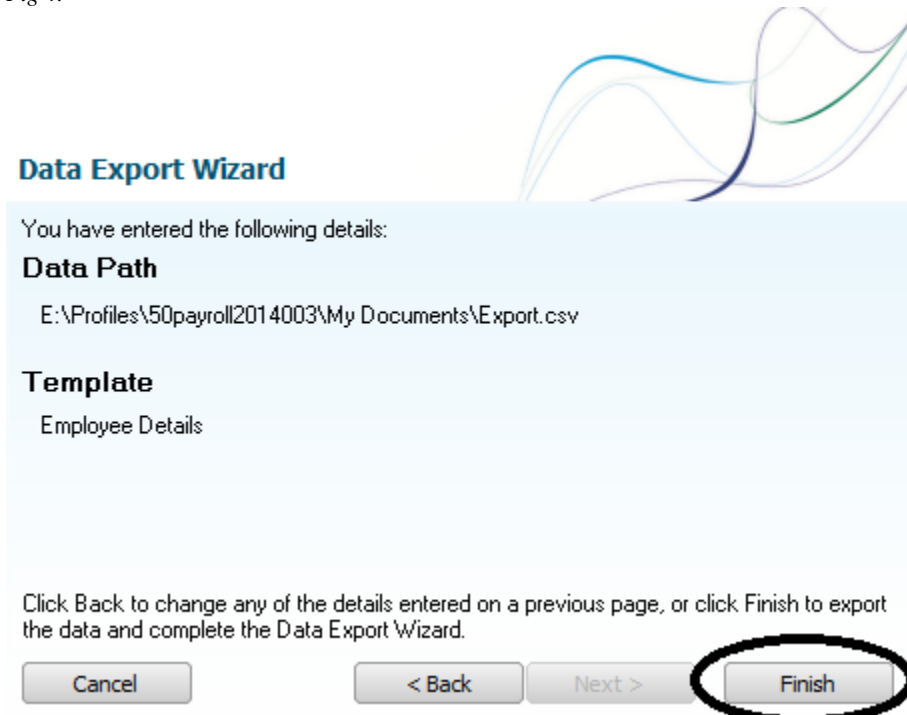Specify the location and name for your exported data file.

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

Path

E:\Profiles\50payroll2014003\My Documents\Export.csv   Browse...

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

Cancel   < Back   Next >   Finish

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.

Cancel   < Back   Next >   Finish

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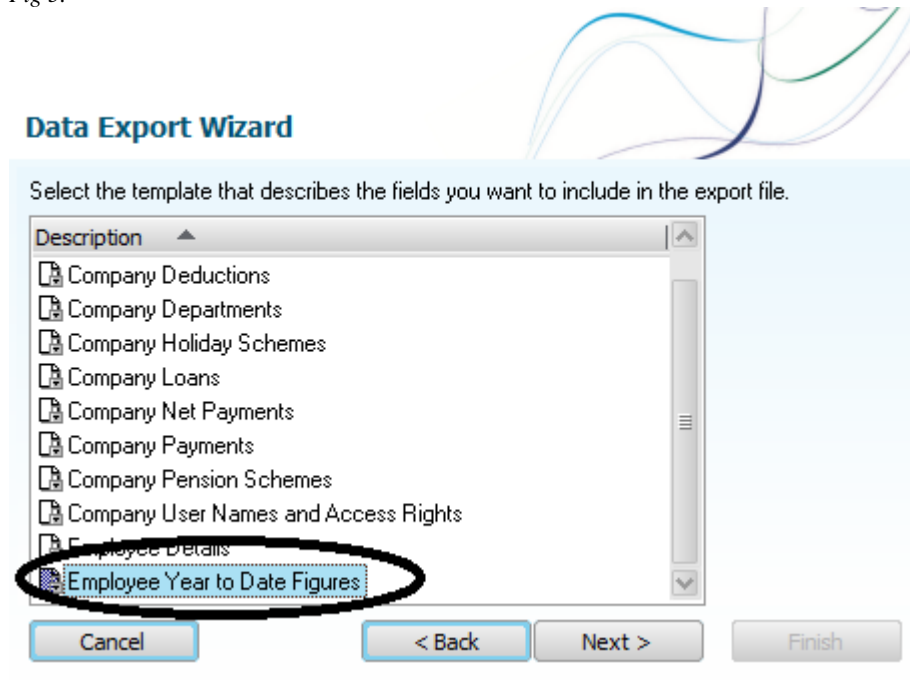
6. Copy the columns which contain the cumulative information from the "**Year to date**" CSV file

Fig 6.

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
ik Addr	Bank Addr	Bank Addr	Bank Addr	Bank Post	Bank Tele	Employee	P45 Gross	P45 Tax Pa	Total Gros	Gross Pay	Gross Pay	Total Tax T	Ers NIC TD E
						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
elmersdale				WN8 6GG		136	0	0	8224.15	7464.99	7464.99	608.8	563.02
elmersdale				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 NI amount together to get a "Total NI Column.

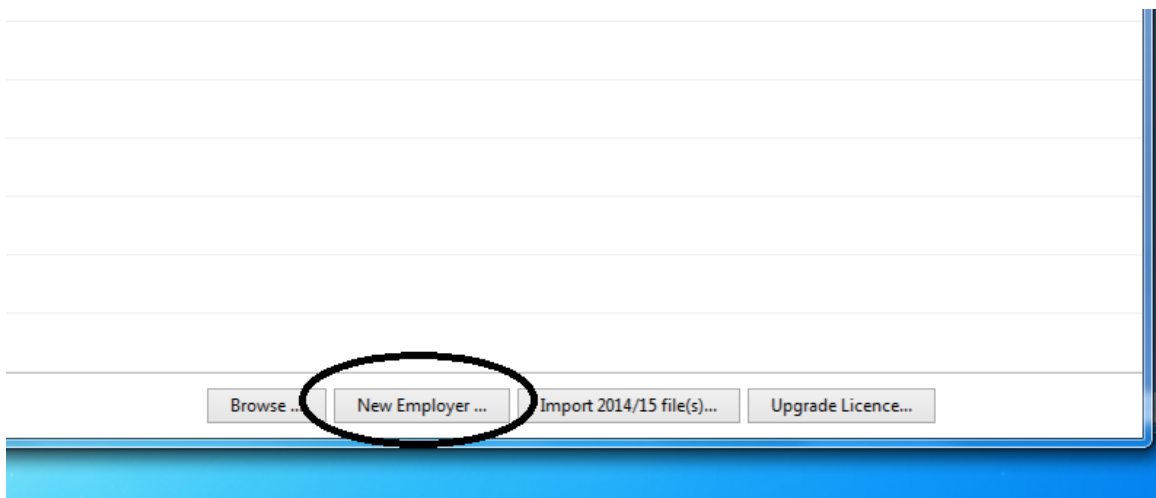| BY	BZ	CA	CB	CC	CD	CE	CF
Gross Pay	Total Tax T	Ers NIC TD	Ees NIC TI	Total NIC	SP Paid T	SSP Week	SMP Pa
9011.7	918.2	778.3	679.2	=sum(CA2:CB2		0	
1923.47	0	0	0	SUM(number1, [number2], ...)		7	
11264.6	1368.8	1087.45	948		0	0	
13208.5	1757.6	1355.15	1180.8		0	0	
7044.55	524.8	505.1	441.6		0	0	
5283.8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

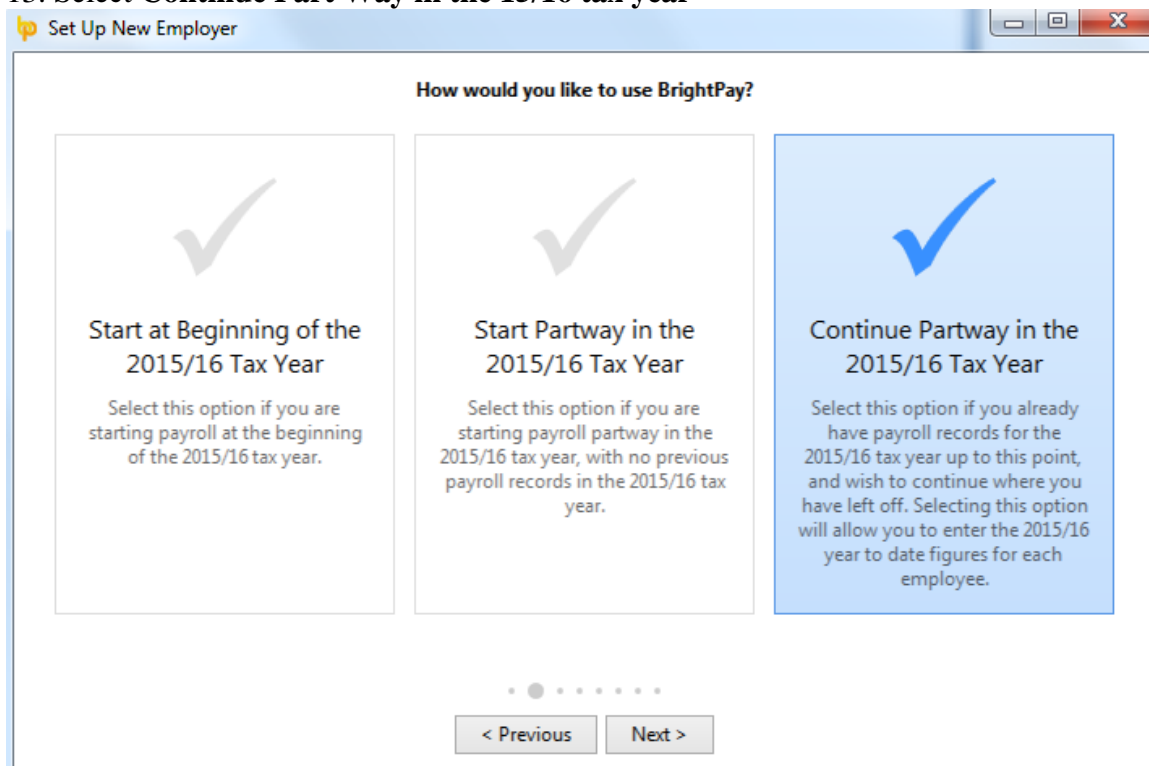| BY	BZ	CA	CB	CC	CD	CE	C
is Pay	Total Tax T	Ers NIC TD	Ees NIC TI	Total NIC	SP Paid T	SSP Week	SMP
011.7	918.2	778.3	679.	1457.5	0	0	
23.47	0	0		0	1855.66	23.67	
264.6	1368.8	1087.45	94	2035.45	0	0	
208.5	1757.6	1355.15	1180.	2535.95	0	0	
44.55	524.8	505.1	441.	946.7	0	0	
283.8	172.6	262.2	230.	492.6	0	0	
64.99	608.8	563.02	49	1055.02	0	0	
566.8	1229.2	990.85	86	1854.85	0	0	
813.2	478.4	474.72	415.	889.92	0	0	
27.47	401.4	420.07	367.6	787.75	66.34	0.75	
00 54	022	706 50	C0C 4	1472 00	0	0 2	

11. Next you will need to Download and Install **BrightPay** from our website
www.brightpay.co.uk
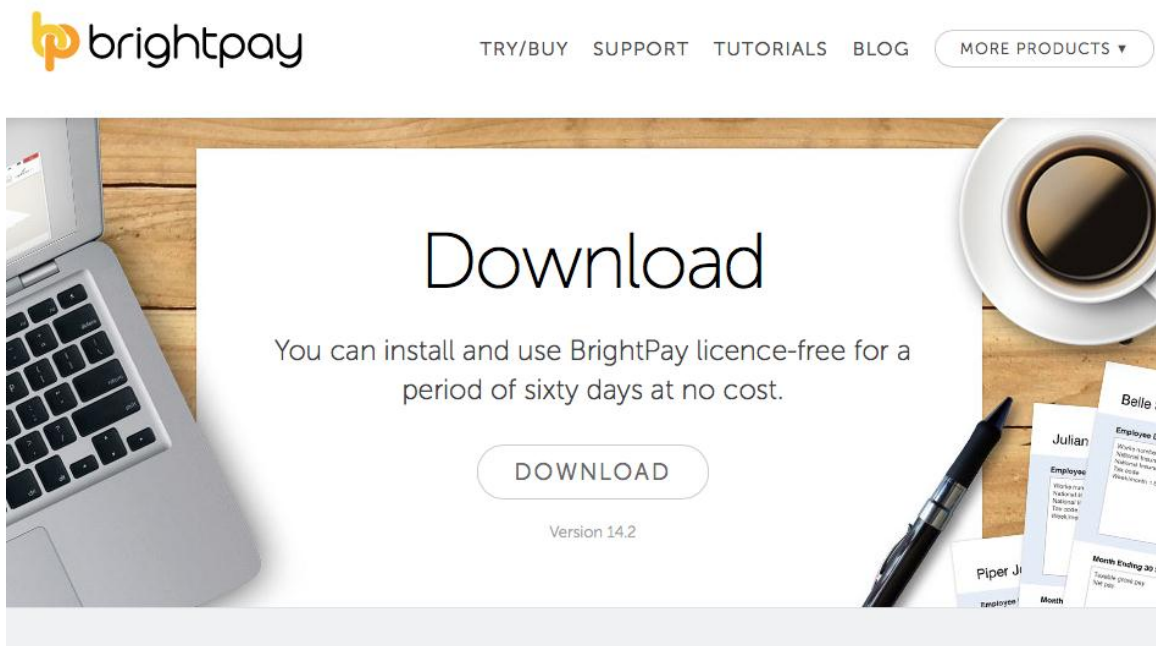
12. Once downloaded **BrightPay** will open, select **New Employer** to create your
company.

13. Select **Continue Part Way in the 15/16 tax year**
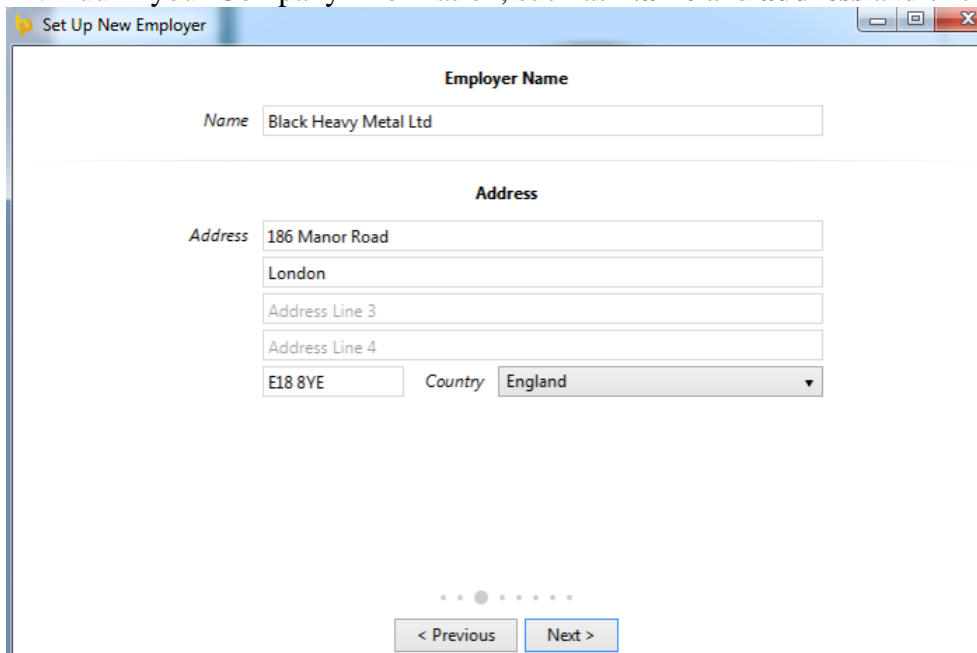
14. Add in your Company information, such as **Name** and **address** and click **Next**

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

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

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

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

19. Open your company, to import your Employees go to **File > Import/ Export Data > Import from a CSV file**
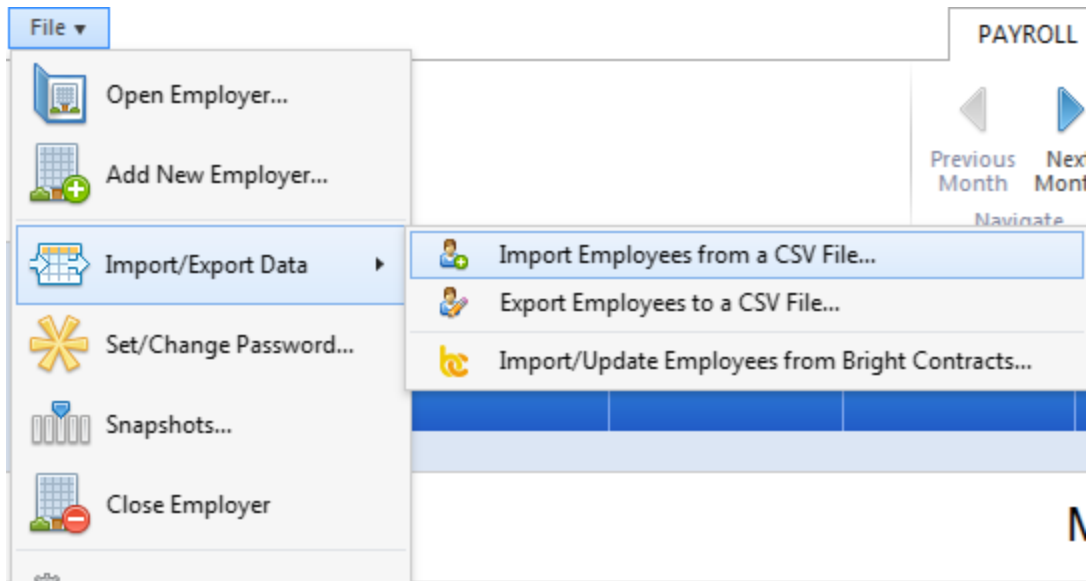
20. Browse to the location of your Employee CSV file. Once selected press **Open**
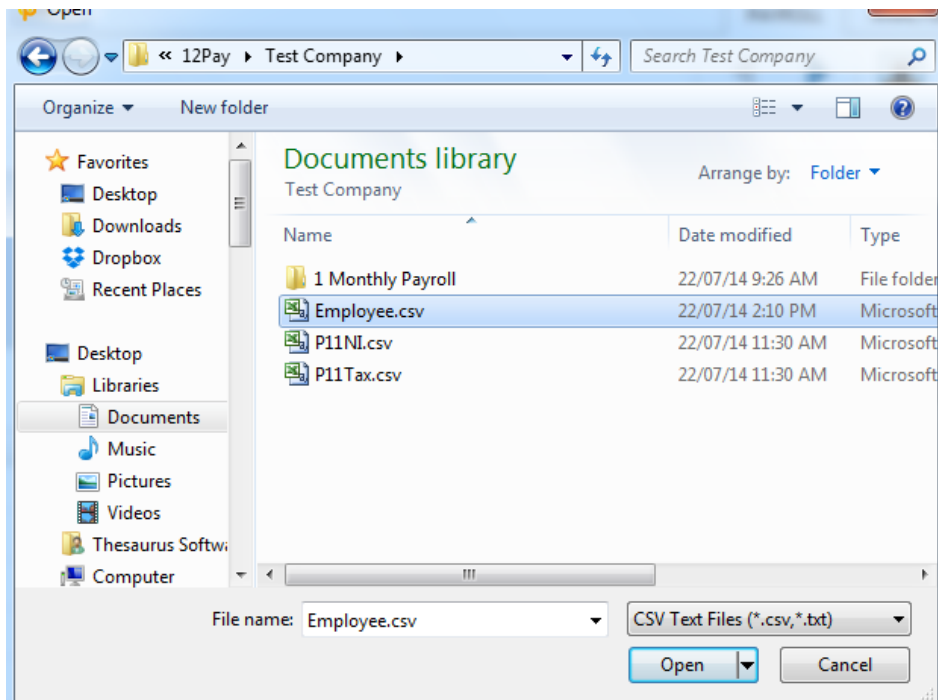
20. Select from the dropdown select what information is in each column, move the scroll bar to the right to select address, date of birth, gender.gross to date etc.

> *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**

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.
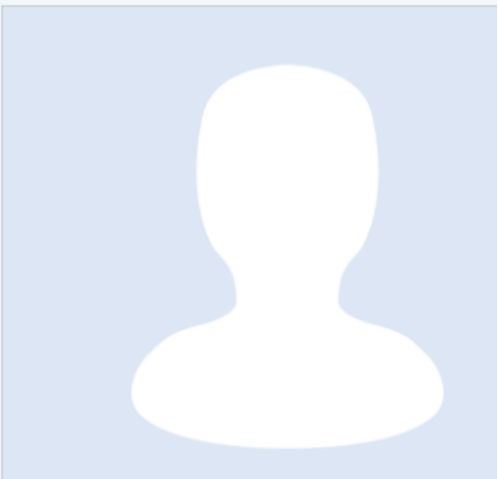
22. You can now start to run your payroll. To set up your payroll schedule go to **Payroll** and select your first pay date and week/ month ending date.