Payroll Guide

10 Tips for Successfully Switching Payroll Software

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Choosing the right payroll software is a top priority for any accountant looking to automate payroll processes and improve profitability.

You may know that you need a solution that can make processing payroll easier and quicker but are perhaps unsure of what software to go with and what is involved in the process.

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This guide aims to break down the process of changing software providers and help you prepare for a successful move. Switching software providers for any business can be a confusing and challenging process, but also an entirely necessary one. This necessity may be even greater when it comes to your payroll software.

Whether you're an accountant processing payroll for one or two clients or a bureau processing payroll for over fifty clients, your payroll software is *critical* to making sure employees receive the right pay, at the right time. You rely on it to deliver the services you promise to your clients. For this, you need a software provider that you can trust and rely on.

For anyone working in payroll, the COVID-19 pandemic has emphasised the variety of duties a payroll processor takes care of and how these duties can change dramatically from one year to the next.

The added workload that many payroll processors experienced highlighted the role and importance of their payroll software. Not only did they need software that was adaptable, quickly making changes in response to Government announcements, but they also needed the assurance of a support team who are ready and available to help them when required. Having the right payroll software for your business is crucial and can mean the difference between a difficult payroll process that you dread each pay period, and one that is so quick and easy, you hardly think about it at all.

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Covid-19 Hero Award: Supplier

2020

BrightPay's quick response and expert guidance to legislative changes was particularly evident during the COVID-19 pandemic. Did you know BrightPay won the COVID-19 Hero Award (supplier) at the 2020 Accounting Excellence Awards? This was judged on our response to COVID-19 and how we helped our customers. The judges recognised that we went above and beyond to support payroll professionals at a time when they were under pressure with government schemes and trying to interpret guidance.

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Work Smarter, Not Harder

Unfortunately, some businesses are unaware of how to prepare for the transition to a new payroll system, or like many of us, are too busy with other tasks to prioritise it. To help you get ready for moving software providers, we have prepared this guide based on insights we've learned through working closely with our customers. With these insights, we've identified critical points, that when addressed mean businesses are well prepared, can transition to the new payroll software quickly, and can get straight to benefiting from improved features and smoother workflows. To hit the ground running, we would urge you to go through this guide, check what is most relevant to you and take action now.

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1 Running your business as usual

Implementing any new software has teething problems. It's not simply a matter of installing the software; it also means migrating the data over to a new system and ensuring that your team is properly trained to use and make the most of it. You cannot afford to process your client's payroll incorrectly. Therefore, we recommend that you initially run your new **payroll software** alongside your previous software. This is a good way to determine that everything has been set up correctly in your new payroll software and there are no inaccuracies. It also provides the comfort of knowing you have a fail-safe. You'll still have access to your previous payroll software and will be able to cross-check employee data after importing.

**Free Trial
60 Days**

BrightPay offers a **60-day free trial** of its payroll software, an ideal way to test out the software to see if it's the right fit for your business. The free trial version has full functionality with no limitations on any of the features, including auto enrolment, CIS, payrolling of benefits, integration with accounting software and much more. There is no obligation to buy. We will not ask you for any credit card details or ask you to sign any contract. Should you decide to purchase BrightPay, our **pricing structure** is simple and straightforward with no hidden costs, in-year upgrade fees, or additional charges for customer support.

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2 Getting staff onboard

Nothing is more valuable than an enthusiastic employee willing and ready to adopt a new system. They may have even been the ones to put forward the idea of moving payroll software. This would not be a surprise as this is the person using the existing software on a day-to-day basis and who understands its limitations better than management. Often, the person at the forefront will look for better ways to manage their workflow and will likely be the one who understands the best options available.

Designating a knowledge expert to implement the software can encourage uptake among employees

An employee such as this, or one that will be using the new software the most, can act as a 'knowledge expert' or 'champion'. Not everyone on your team requires a comprehensive knowledge of all aspects of the software. However, it is useful that one or more on your team (depending on the size of your business) becomes experts on the system. These experts can not only lead training sessions, but they can also act as advocates of the software, explaining its benefits and encouraging its uptake to their colleagues.

With BrightPay Payroll Software you have access to an extensive list of features that provides a complete solution to your payroll needs. At the same time, BrightPay's interface has been designed to provide an intuitive and hassle-free experience.

To help you get started, BrightPay offers a quick 20-minute demo where multiple members of the payroll department can attend at the same time. **Learn more about this here.**

3 Migrating data

How much time will you need to spend entering data to get the new payroll system up and running?

Arguably, migrating data from an old system to a new one is the most time-consuming part of the job. Certainly, it's the most tedious. However, it is an important part of the process and requires careful attention to reduce errors and minimise potential issues which may arise in the future. Early preparation is key. Be sure to adequately plan for the time it will take and set realistic expectations. An additional benefit of focusing on this task early in the process is that it can help with employee training.

Book a free BrightPay migration consultation

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To experience the benefits of your new software straight away, BrightPay offers a dedicated migration team. The migration specialists will help you through the importing and setup process, ensuring a smooth transition to BrightPay. **Click here to book a free migration consultation.**

> To speed up the migration process, BrightPay includes an import facility. If your current payroll software allows it, you can export your data in a CSV file format (or to Excel, which can subsequently be converted to CSV format) and import it into BrightPay. If there is no option to export a CSV file from your existing software, you also have the option to import the employee information using an FPS file.
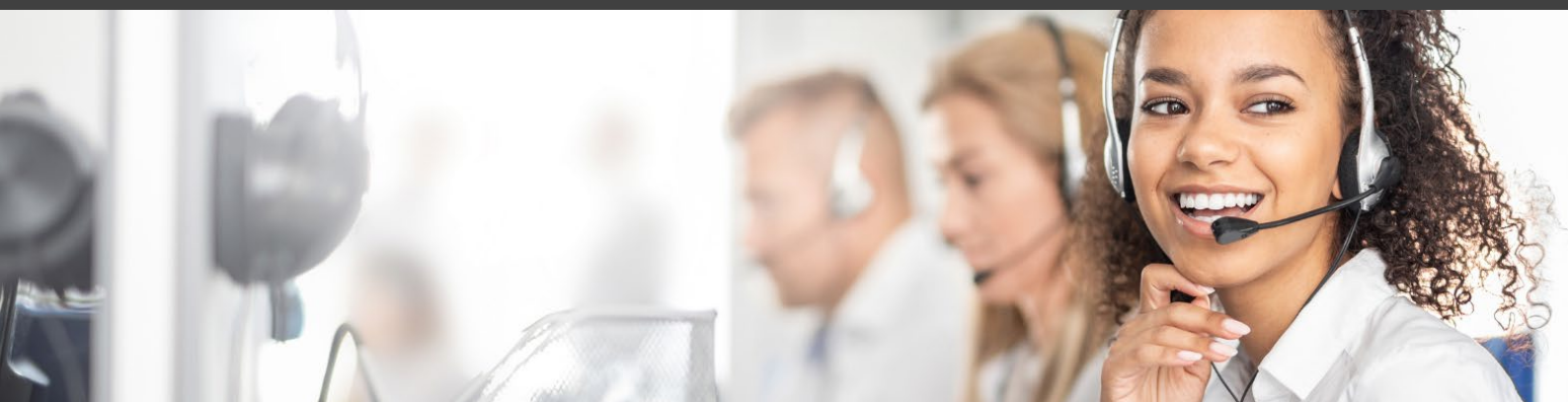
4 Future payroll support

Customer support is something that every business needs when switching software. When preparing to change software providers you may be focused on the support you require right now and not on what is offered to you if problems occur in the future. However, even if migration runs smoothly, chances are you'll have a question or a tricky issue down the line that you will need help with. Moreover, the payroll sector is notoriously changeable, and without support, it can be difficult to keep on top of changes to payroll legislation, employment law, or changes to workplace pension laws.

The right payroll software can and should offer significant help when issues arise. When considering your options, check whether the payroll software provider has a dedicated customer support team. Confirm the various ways you can get in touch with them and ensure there are no additional costs associated with customer support.

A lack of support beyond the implementation phase is not acceptable and neither is a whole host of added costs. At BrightPay, we believe providing free support is what's best for our customers and it motivates us to create easy to use, problem-free software. Don't just take our word for it though. **View our customer testimonials page and see for yourself!**

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BrightPay support is completely free and has been for nearly 30 years! You can be confident in knowing you'll always have the most up-to-date software in line with current payroll legislation. You'll have payroll experts available to you via phone and email, as well as free training webinars, video tutorials, eBooks, and comprehensive online support documentation.

5 Making time to train employees

Taking time to train is an important but often overlooked step on this checklist. Inconsistent or inadequate training can hold businesses back from using the full functionality of their software and getting the most out of it. Finding the time to train employees on a new system is a common challenge for many businesses. Through our own internal and external training experiences at BrightPay, we understand what does and doesn't work. There is no magic solution for this, but it can be quickly addressed.

Managers need to support the adoption of the software and prioritise training in teams' schedules.

Managers need to support the adoption of the software and prioritise training in their team's schedule. To train effectively, use a variety of learning formats, including videos, demos, and documentation. Crucially, don't simply 'show' how the system works, but rather ask your employees to explore the program themselves. An initial exploration of the software before any formal training can be very useful, as it helps to make the training more relevant.

Employee training can also be supported by a 'buddy' system. Peer-to-peer learning is a collaborative teaching method that reinforces your own learning by teaching others. This can be achieved by having pairs ask each other questions, problem-solve, and demonstrate to each other how different aspects of the system works. A teaching method like this helps to hold each other accountable to a training schedule.

BrightPay Payroll has been designed with a special focus on the user interface so that it is simple and intuitive to use. So much so that even the most inexperienced payroll processor can, in a short time, get to grips with the software. The first thing we would recommend in terms of training is to book one of our **free online demos** of BrightPay.

The demo will take you through how BrightPay payroll software works and the process of running your payroll on a day-to-day basis. Following the demo, we offer a more in-depth video recording of how the software works. Additionally, we offer support documentation and many other video tutorials on our website.

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6 Integrating with existing financial tools

Next on our checklist is the importance of integrating your payroll software with the financial tools you already use (or want to use — think ahead!). It's often the case for accountants to consider their accounting software as the essential hub of their business tools. Choosing a payroll software that integrates with this hub can have a significant effect on how efficient your payroll workflow can be.
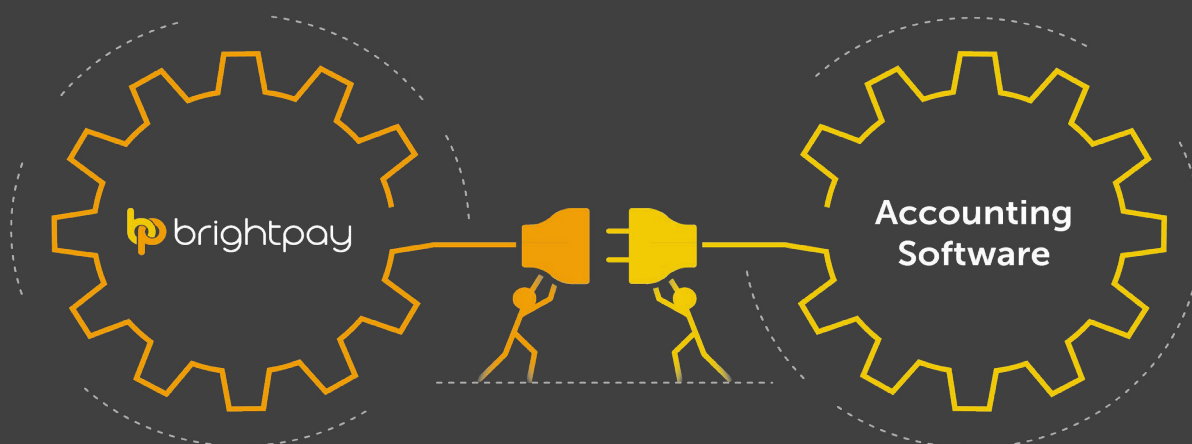
Integration between your payroll software and your accounting software can save you time as it means you no longer need to spend time on double entry and manually copying figures. Once you have it set up, you can benefit from faster processing times, instant mapping of payroll items to the relevant nominal accounts, and less chance of making a mistake. Journal integration isn't the only API integration offered by BrightPay and it isn't the only system integration you need to consider when buying a new payroll software. You'll need software that caters for and handles auto enrolment duties and one that integrates with different pension schemes. This type of integration can of course save you time, but BrightPay's auto-enrolment functionality can also automatically assess employees for eligibility and make sure you never miss a re-enrolment date. **Discover these auto-enrolment features here**.

> BrightPay Payroll recently added even **more direct API integrations** with accounting packages. Integrations with ClearBooks, Freshbooks, QuickFile, and Zoho Books have been added to the list of existing options which include AccountsIQ, Sage Business Cloud Accounting, and Xero. **You can view the full list here**.

7 Expanding your service offering

If you work as an accountant or bookkeeper, you likely offer many different financial services to your clients, with payroll being one of them. When searching for your new payroll software, consider what payroll services you currently offer. Will your new software still provide you with what you need in order to continue offering these services? Even better, can your new software provide you with the opportunity to offer additional services?

When switching payroll software, the new software should facilitate a quicker payroll process with fewer mistakes. Choosing software that integrates with your current service offering is to be expected but it also offers you the opportunity to review and expand the services you offer, and ultimately improve your bottom line.

Offer Payments as a Service:

BrightPay provides access to digital banking and Faster Payments Service with the payments platform, Modulr*. This means you can pay employees in under 90 seconds, 24/7, 365 days a year. You can also pay subcontractors directly on behalf of your clients and pay HMRC the tax and National Insurance (and any other deductions) owed for each pay period. **Learn more about this service here.**

Offer CIS Services:

The Construction Industry Scheme (CIS) and its associated responsibilities represent a valuable opportunity for accountants. It opens up an entirely new customer base with the potential to grow your client list. The start-up costs for offering this new service doesn't have to be high either. Unlike other payroll software, BrightPay offers **full CIS functionality** included in the payroll licence. There are no hidden fees or additional costs for it. You're good to go!

Offer Additional HR Services:

In a competitive market, to truly stand out from the crowd, consider offering BrightPay Connect, an online client portal. With this additional cloud platform, you can offer clients the ability to further integrate their payroll and HR duties. Self-service dashboards allow employers to control annual leave requests, give employees access to payslips, run their own payroll reports, approve the payroll summary, and update and edit employee personal information. **Learn about BrightPay Connect here**.

* Please note, the Modulr functionality is only available for BrightPay Windows users.

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8 Future thinking: scaling up your payroll

Although you may be thinking about what you need for your business right now, you're also likely to be thinking of the future. If you expect or have forecasted your business to grow, you want to make certain that your software can keep up. Can it manage the number of employers you expect to take on as clients? The number of clients you have isn't the only figure you should be looking at. Your clients' own growth expectations and hiring forecast should factor into your decision as well. Will your payroll software manage their growing number of employees? If not, in only a few short years, you may have to move software again.
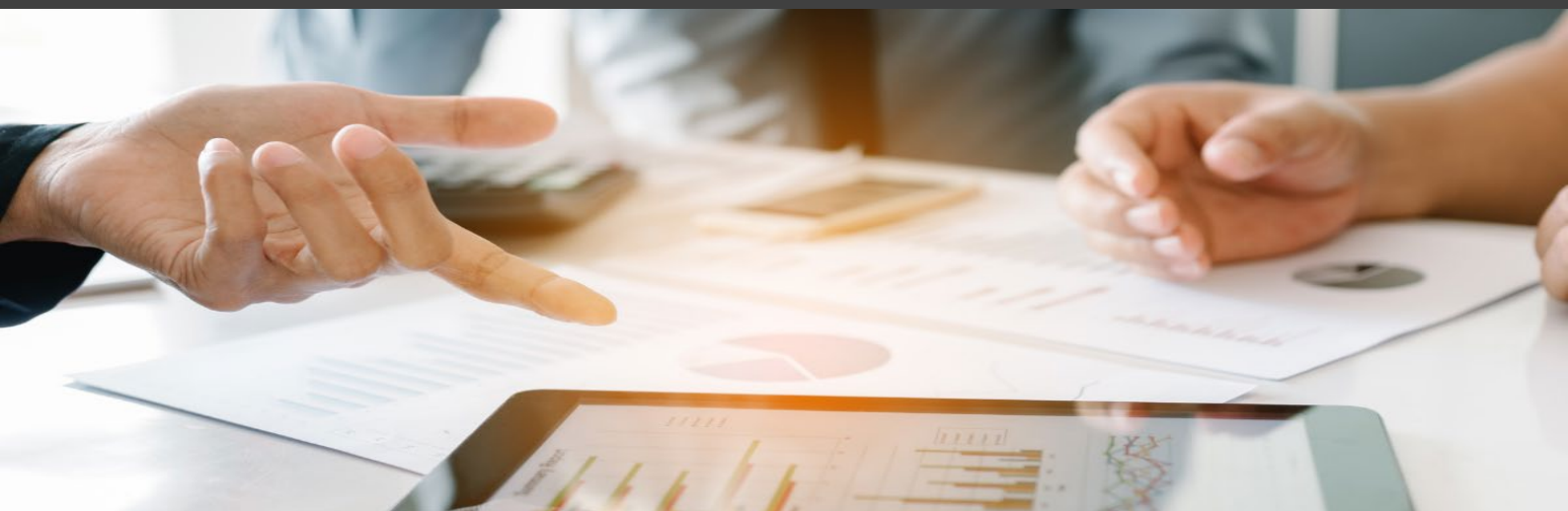
To avoid this potential headache and time wasted, examine the type of licences offered by the software company and any caps they may have on employee numbers. Often, there are limits associated with different types of licences, on the number of employers or the number of employees you can process payroll for.

We have designed BrightPay's pricing structure so that it's clear, simple, and reflects our different customers' needs.

BrightPay's different licence options cater for small payroll bureaus with less than 10 employers, all the way up to a large bureau with a licence for an unlimited number of employers and employees. With the option of different licences and the knowledge that BrightPay can cater for unlimited employees, you can concentrate on your business without having to worry about whether your payroll software can keep up.

In addition to this, BrightPay Connect can grow with your client's businesses. As BrightPay Connect is billed based on the number of active employees using it, it can easily scale up to meet your customer's needs. **Discover more about BrightPay Connect's monthly subscription service here.**

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9 Check for hidden costs and clauses

It's common for customers who are searching for new software solutions to look for one that is agile, can keep up with industry changes, and doesn't require a costly set-up charge. When focused on not having to pay this set-up cost, sometimes hidden costs and clauses go unnoticed, but end up costing them in the long run.

There are many software providers across all types of industries including payroll and HR that are focused on delivering an excellent customer experience and improving functionality without drastically hiking up prices, using economies of scale to deliver better value for their customers. On the other hand, there are some software providers you need to watch out for. Those who lock you into long contracts, charge you for 'extra features', make it difficult to leave without a long notice period, require you to pay for customer support, and in some cases, automatically increase your fees each year.

To avoid getting trapped in such a scenario, carry out your due diligence, read the fine print, and avoid vendors with opaque and confusing contracts.

With BrightPay Payroll, all licences include full functionality at no extra cost – along with free customer support you will have full functionality for auto enrolment, payrolling of benefits, emailing payslips, off-payroll workers, and a CIS module, so you won't be caught off-guard with any hidden charges. The only additional cost is for the optional cloud add-on, BrightPay Connect, and the pricing for this is very transparent.

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All BrightPay payroll licences are per tax year with no long-term contracts and there is no obligation to give us notice if you wish to go elsewhere. The BrightPay bureau licence is available for payroll bureaus and accountants – this licence starts at £249 for up to 10 clients (each with unlimited employees) and goes up to £499 for unlimited employers and unlimited employees. Prices are per tax year excluding VAT and each of these licences can be installed on up to 10 PCs or Macs.

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10 Knowing when to make the move

The final point on this checklist is deciding when you should switch payroll software. Knowing when to make the move can be difficult. A good rule of thumb is to change payroll software at the beginning of the tax year or at the start of a new quarter to keep your financial records easier to follow. The earlier in the financial year you switch, the easier it will be because there is less historical data to move into the new system.

We would recommend moving at a time that is most convenient to you. In many cases, it may not be practical to move at the start of the tax year but at the same time, staying with your current provider is not an option. Although moving during the tax year will require extra time to gather and transfer mid-year pay information, it can be made easier when you avail of BrightPay's free migration consultation to help you through the process.

While moving during the tax year can be more time-consuming, it is also worth considering the immediate and long-term benefits. If you move now rather than waiting another six months, how much time will you save each month on payroll? What additional services can you offer to your clients? How else can it benefit your practice?

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In Summary

For any business to stay successful, they need software that not only supports them but that can also add value to their business proposition. When it comes to accountants and bureaus, your payroll software can clearly impact the success and running of your business. Choosing the right software is crucial. The necessary switch to a better provider can, sometimes, be challenging. However, with this guide, you now have a greater understanding of what you can do to better prepare for switching software providers.

By preparing for the move, you can minimise any possible challenges, reduce any chance of disruption to your business, and most importantly, begin to reap the benefits of your new payroll software. From adding value to your services, creating new opportunities for growth, and simplifying your payroll process, BrightPay payroll software will provide immediate benefits to your business and to your clients.

Your next steps:

1   Attend a free online demonstration of BrightPay

Discover more ways that BrightPay and BrightPay Connect can help your accountancy practice or payroll bureau come back stronger from this challenging time.

2   Start a 60-day free trial of BrightPay

BrightPay's 60-day free trial is a great way for you to discover just how easy BrightPay is to use without having to make any commitment.

3   Join our free webinars

Hear from the payroll experts on how the latest updates are impacting payroll and how you can best support your clients.

Payroll Software You Can Trust...

Payroll Software of the Year 2018 & 2019

Trusted by over 320,000 Businesses

99% Satisfaction Rate & 5-Star Rating

30 Years' Experience Developing Payroll

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Payroll Software

- Batch Payroll Processing
- Pay Employees & HMRC
- Accounting Software Integration
- Auto Enrolment and CIS Included
- Free Customer Support
- 320,000 Businesses in UK & Ireland
- 99% Customer Satisfaction

brightpay connect
Cloud Add On

- Bureau & Client Dashboard
- Automatic Cloud Backup
- Client Payroll Entry
- Client Payroll Approval
- Payroll Audit Trail
- Leave Management Tool
- Employee Self-Service App

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