Bright
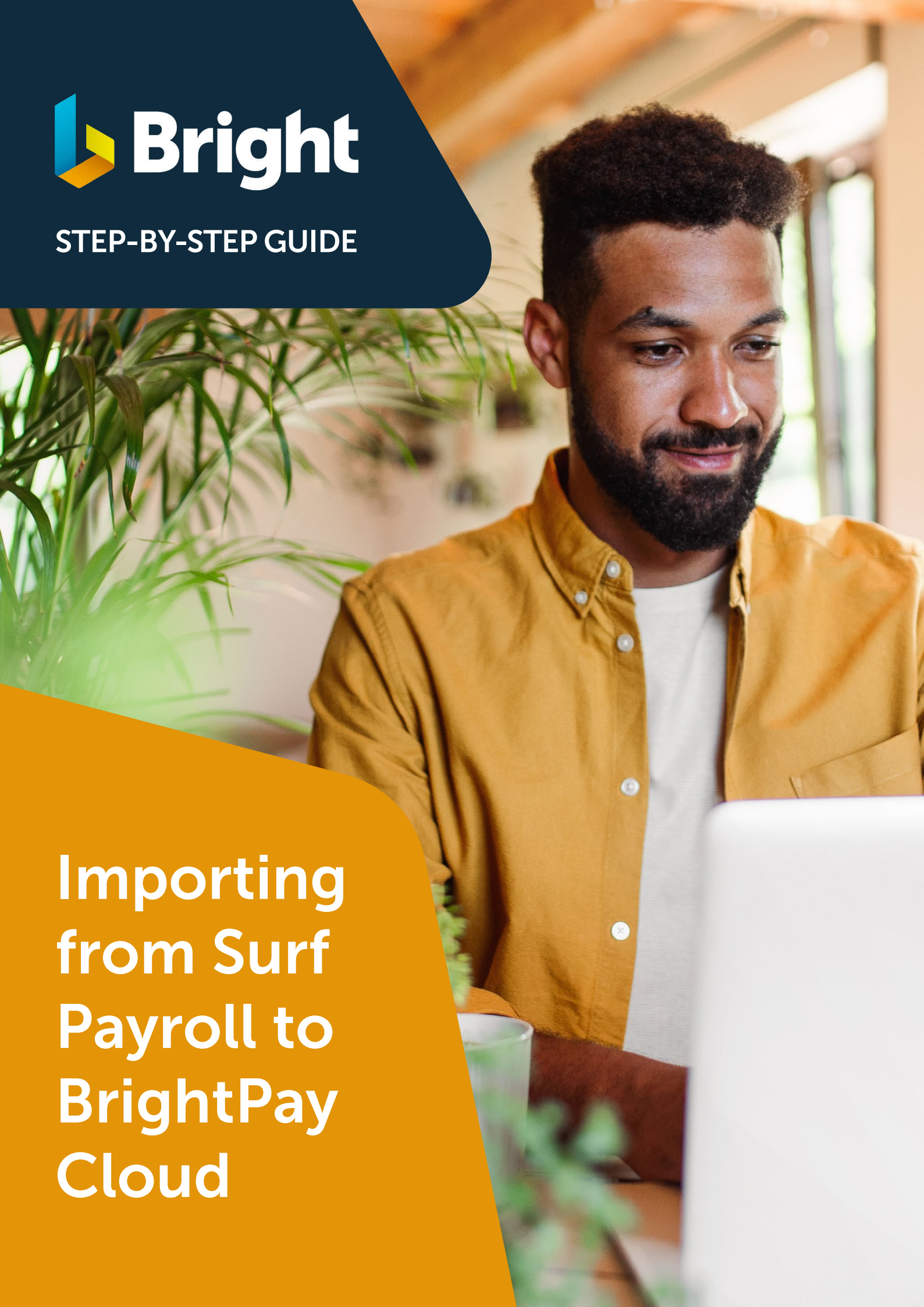
Importing from Surf Payroll to BrightPay Cloud

## To sign up to BrightPay Cloud click here:

Sign Up

BrightPay Cloud facilitates the importing employee information in CSV format from Surf Payroll or from Revenue Payroll Notification (RPN).

Setting up Employees using CSV File

1

To export employees information (and year-to-date pay information to date if migrating mid tax-year), within Surf Payroll go to Employees menu> Employees> Export employees.

If the export employees option is not available go to Settings menu> Business> Users> open user's profile and add the permission by ticking the box.
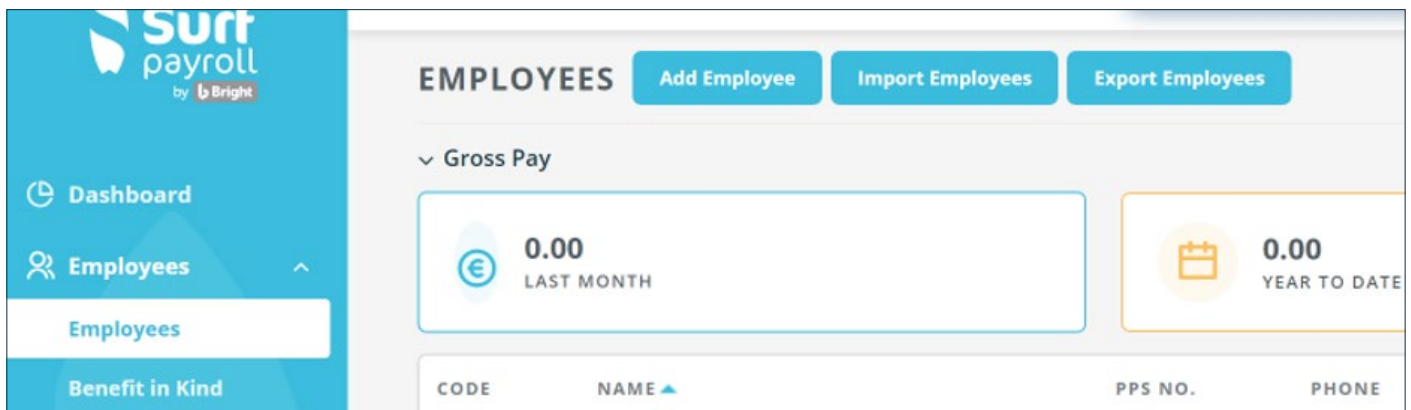

Do not open the CSV file, as Excel will format items such as sort code and account numbers and they may no longer be importable into BrightPay.

2

As a new user, when you log into BrightPay, on the Welcome to BrightPay you will have a step-by-step guide on how to set up your information (3 steps).
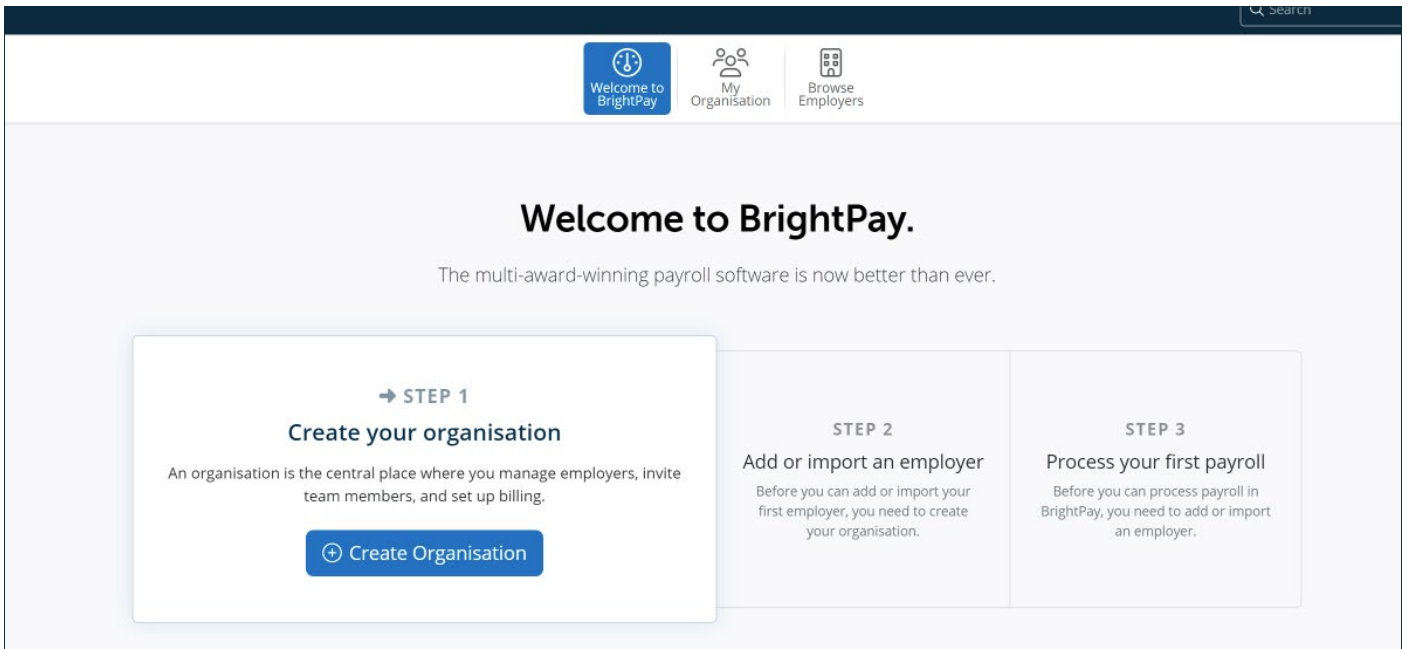
Sign into BrightPay by using your existing BrightD. If you don't have a Bright ID, click Sign up and follow the steps.
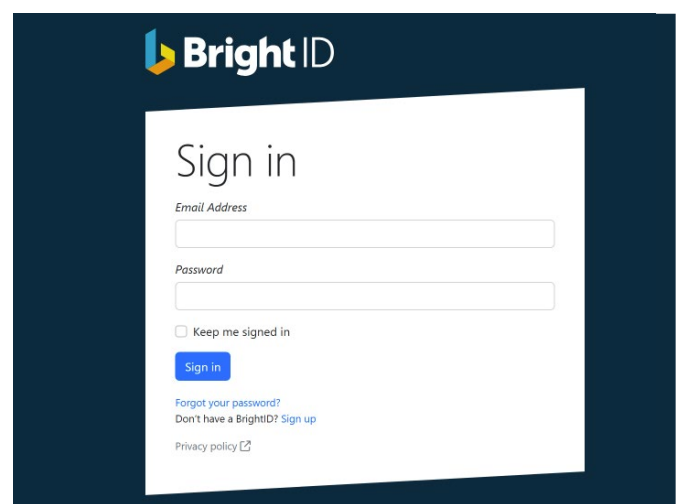
3

Once signed into BrightPay Cloud you will need to set up an Organisation.

An Organisation is where employers, team members and billing are managed.

To set up an Organisation enter your organisation's details, choose your payment plan and add a payment method.

Once all the Organisation's details are entered when you select 'Create Organisation' the organisation will be created.
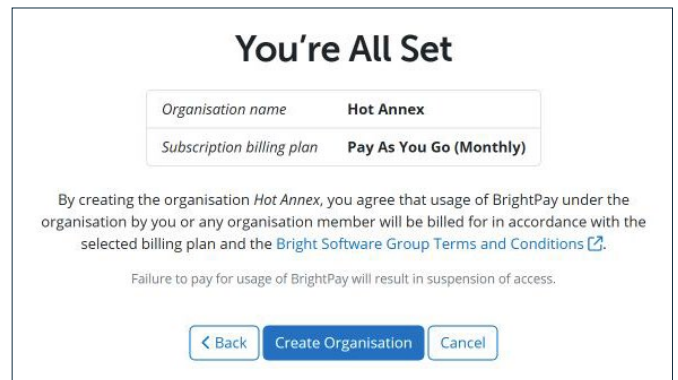
4 In order to create your new employer select the Add New Employer option, Adding an Employer Manually - BrightPay Documentation

Complete each screen accordingly with your relevant employer information.
For further assistance with this, please see our support section Adding Employer Details.

To see the company details in Surf Payroll go to Settings> Business > Business details.
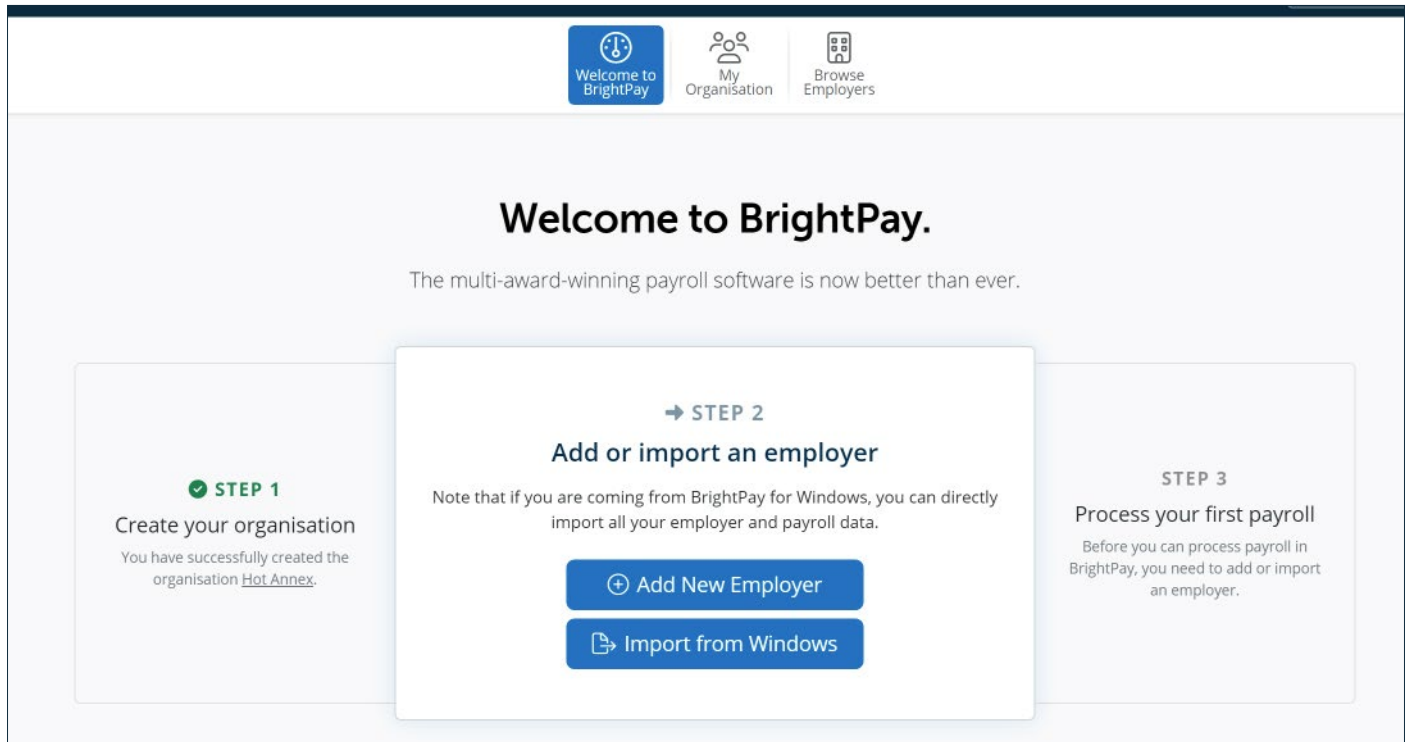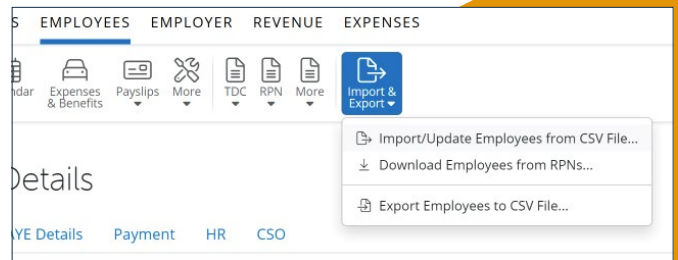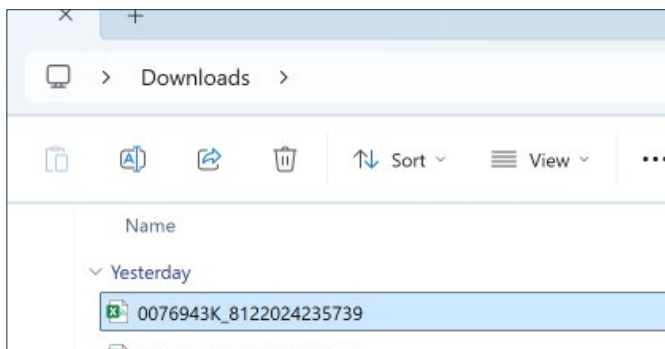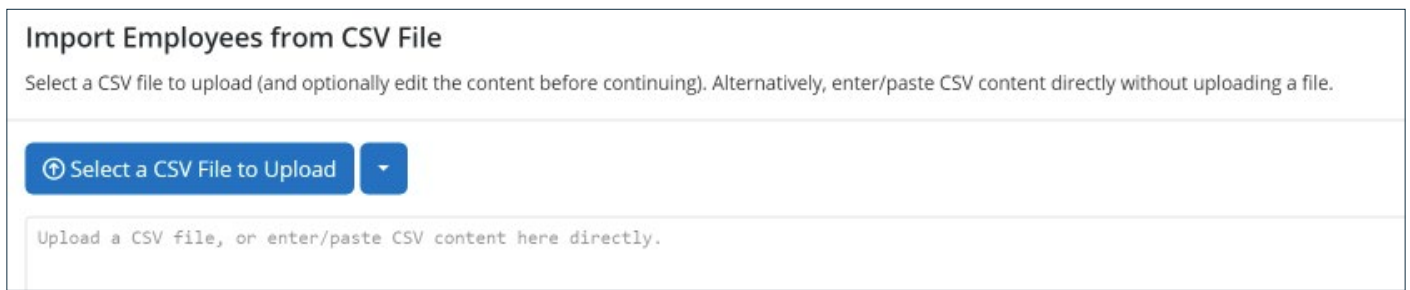

5 Select Open Employer.
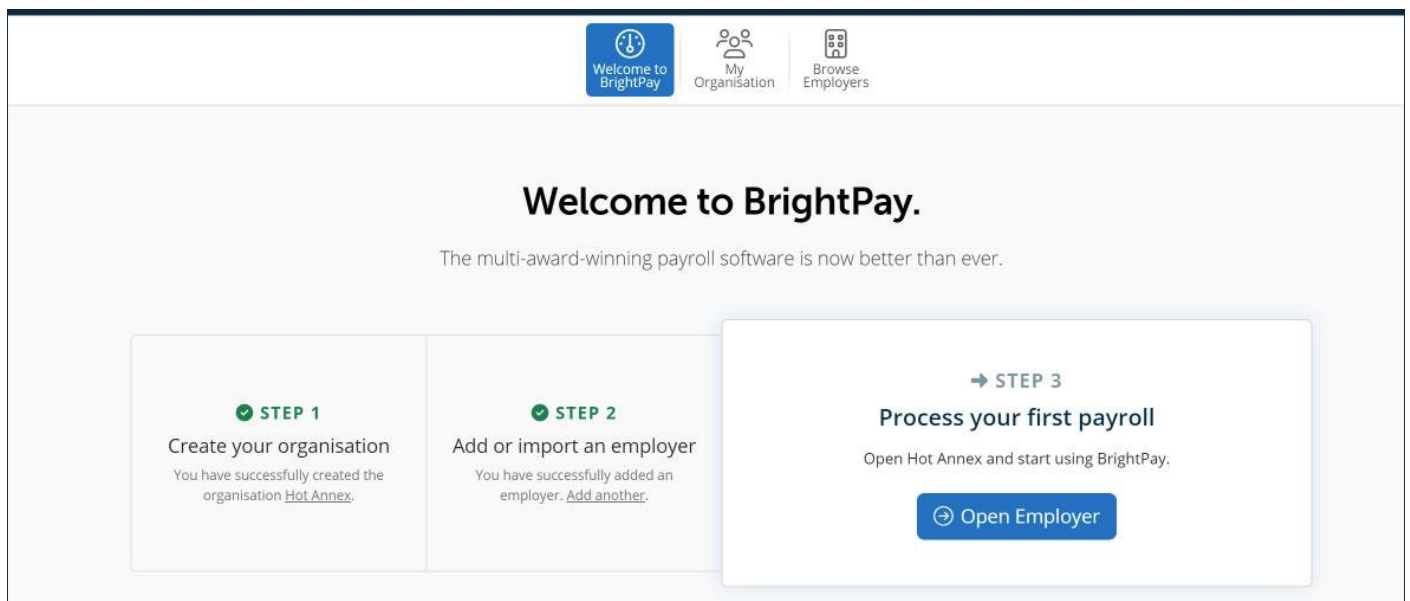
6

Once you have entered and saved your employer information, go to Employees tab > Import & Export > Import/Update Employees from CSV File.
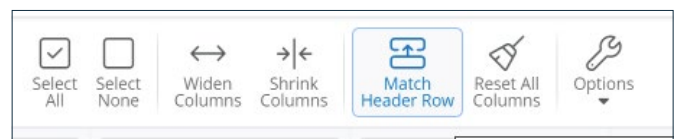

7

Click select a CSV File to Upload and Browse to the location of your CSV file, select it and press 'Open'.
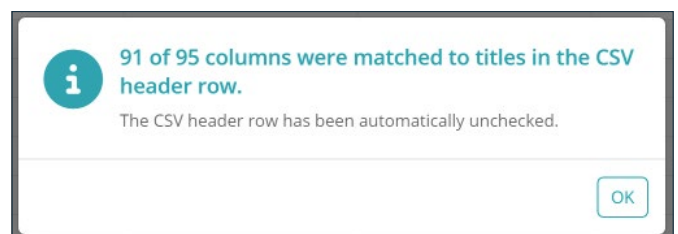

Your employee information will be displayed on the screen.

To assist with column selection, simply select 'Match Header Rows'.
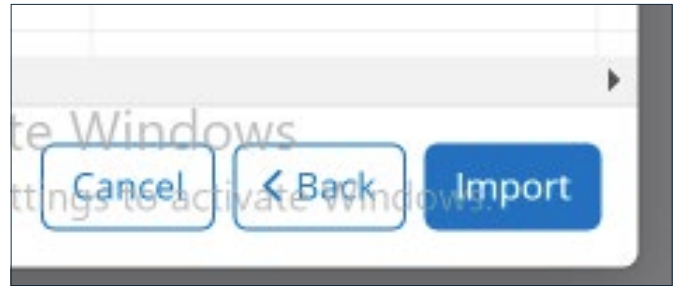

BrightPay will match as many columns as it can for you. Ignore any columns and uncheck any rows you do not wish to be imported. Untick the header row.

91 of 95 columns were matched to titles in the CSV header row.

The CSV header row has been automatically unchecked.

OK

8

Click Import to complete the import of your employee information.

Following the import, further employee information can be manually entered within 'Employees',

Alternatively, you may wish to update missing employee information using CSV file.

The first task you will need to perform in BrightPay before you can commence with your payroll is to add your Revenue Digital Certificate into the software.

To add Employer ROS cert, Adding your ROS Certificate - Employer - BrightPay Documentation

To add Agent cert, Adding your ROS Certificate - Agent - BrightPay Documentation

You may need to set up pay items which could not be imported from Surf Payroll such as rates, additions/deduction types, pension schemes, benefit in kind, employer bank details etc.

It is also recommended that all employee details are reviewed before processing any payroll to ensure information imported in is correct and applicable.

After reviewing your employee information, click the 'Payroll' tab to commence processing payroll.

Setting up Employees using the Revenue Payroll Notification (RPN)

1

To create an Organisation and add new employer follow steps 2 to 5 from 'Setting up Employees using CSV File'.
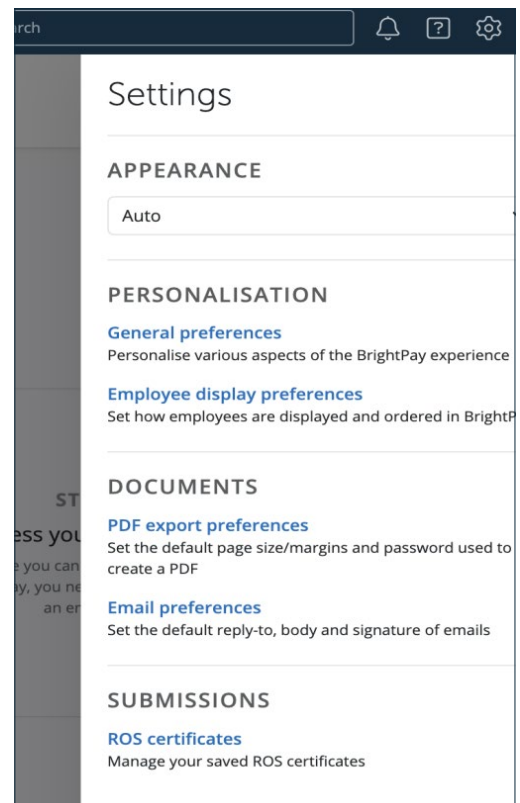
2

Before you request an RPN to import your employees, you need to add a ROS Digital Certificate.

To do it, go to Settings in top right corner and choose 'ROS certificates'

For more details click here:

To add Employer ROS cert, Adding your ROS Certificate - Employer - BrightPay Documentation

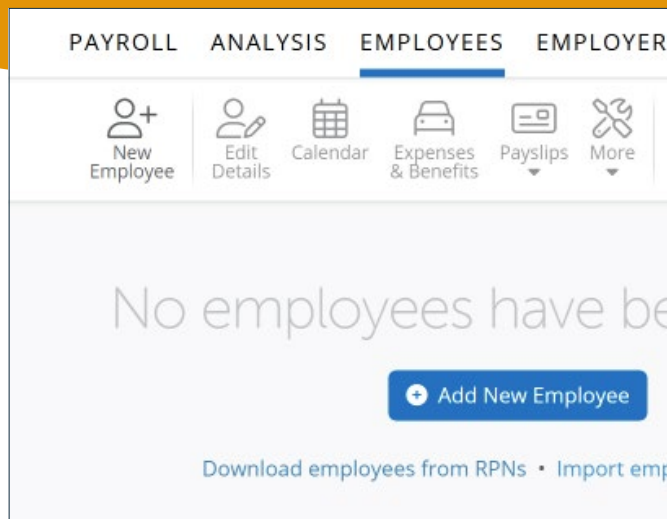To add Agent cert, Adding your ROS Certificate - Agent - BrightPay Documentation

Bright

3

To download employees from RPN,
go to 'Employees > Download employees from RPNs.'

BrightPay will connect to Revenue's systems and retrieve all available RPNs. By default, all employees for whom an RPN is available will be ticked, ready for download. If you wish to download all employees at the same time, simply click on 'Add Selected Employees'.

Alternatively, if you only wish to download some of the employees displayed, untick any employees you don't wish to add before proceeding. These employees can be added at a later time if required.

Employee records will now be created for the selected employees, which can be accessed within 'Employees'. It must be noted however that setting up employee records in this manner will only bring in the information that is included in the RPN, e.g. the employee's name, PPS number and revenue details.

Further manual entry may thus be required in each employee record for employee information that is not included in an RPN e.g. the employee's rate of pay, email address, bank details, annual leave entitlement, departmental allocation etc.

After reviewing your employee information, simply click the 'Payroll' tab to commence processing payroll.