



Migration guide: Streamlining your switch to BrightPay Cloud

Sign up for BrightPay Cloud here:  [Sign up](#)

Discover how to directly import your employer data file from BrightPay Desktop into BrightPay Cloud.  [Watch Demo](#)



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Section 1: Internal planning steps



Purpose:

Establish your internal migration approach and prepare your team for transitioning clients before BrightPay Desktop reaches end of life after the 2026 tax year.

Detailed planning actions:

Assign a cloud migration champion:

Designate a team lead to oversee timelines, communication, and coordination.

Segment your client base:

Group clients based on readiness, complexity, and needs. Prioritise high-impact clients.

Define your migration strategy:

You can move to BrightPay Cloud mid-year, ensuring a clean transition at the start of the 2027 tax year.

Run a pilot migration:

Trial the process with a small group of clients and collect feedback. You can run a parallel payroll to familiarize yourself with the new software.

Flag special cases:

Indicate clients with over 300 employees per employer. BrightPay is currently restricted to 300 employees, if your employee number is around 300 or more contact our team at brightpaysales@brightsg.com

Set a transition timeline:

BrightPay Desktop reaches end of life after the 2026 tax year. Migrate your clients now gives you time to learning new system, train staff and clients if relevant.

Assign team roles:

Allocate responsibilities across onboarding, training, and client support.

Create clear internal docs:

Prepare pre-migration checklists, validation procedures, and communication trackers.

Find the Migration Checklist [here](#).



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Section 2:

Migrating to brightpay cloud: step-by-step guide



Step 1

Learn more about BrightPay by exploring its features and the benefits of operating in the cloud

 [Learn more](#)

 [See BrightPay in action](#)

Plus, review to [BrightPay Cloud's feature comparison with BrightPay Desktop](#) ensure the features you require are available and review our [Moving to BrightPay Cloud: What do you need to know document](#).

Step 2

Ready to move your employer(s) to BrightPay Cloud?

Pro tip: You can migrate your employers to BrightPay Cloud in stages to familiarise yourself with the new software. Start with a simple payroll, and once you're confident, move on to more complex payrolls to fully explore BrightPay Cloud's features.

How to move from BrightPay Desktop to BrightPay Cloud?

Follow the steps below or watch our migration tutorial -

 [Watch migration video](#)

1. Create your organisation.

Go to <https://brightpay.brightsg.com> and log in using your BrightID.

**If you have already purchased BrightPay, or used BrightPay Connect or other Bright products, you will already have a BrightID.*

If you don't have a Bright ID, click Sign up for a Bright ID and follow the steps.

Once logged in, you will be asked to create your organisation. An organisation is where employers, team members, and billing are managed. Here, you need to enter your organisation's name and address, choose your billing plan, and add a payment method.

*Need more help? [Check out our resources to help you get started.](#)



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Section 2:

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2. Import your employer(s) from BrightPay Desktop.

Select the option 'Import from BrightPay for Windows'. Read the Post-Import Checklist and follow the on-screen instructions.

To import the employer, click Select the employer file(s) you wish to import, and BrightPay will import all of the required payroll data.

To import multiple employers, press and hold the 'Shift' key on your keyboard and select the employer files you wish to import. You can import up to 10 employers per batch.

If the employer data file(s) is password protected, you will need to enter the password to import the employer(s).

[*Discover more information on how to import your employer\(s\)](#)

FAQs:

- What information/data comes across when I import my employer from BrightPay Desktop to BrightPay Cloud?

When importing an employer from BrightPay Desktop to BrightPay Cloud, your employer and employees' details will come across, as well as pay elements, pensions, payslips, benefits and reports, along with the pay periods you've updated in the current tax year.

- Do I need to re-add my Revenue Digital Certificate in BrightPay Cloud?

Yes, you'll need to re-enter the ROS Certificate. To do this, just click on the Settings icon in the top right corner, then go to the Submissions section.

3. Open your employer.

Select Open employer to access your payroll data.

You're ready to start using BrightPay Cloud!

FAQs:

- How to invite additional team members to my organisation?

Within 'My Organisation' select the 'Team Members' tab, followed by the 'Invite New Member(s)' button. Click [here](#) for more details.



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Section 2: Migrating to brightpay cloud: step-by-step guide



Pro tip: Bookmark BrightPay in your web browser so it's right there wherever and whenever you need it.

Step 4

Have you been using BrightPay Connect?

BrightPay Cloud and BrightPay Connect are two separate products. BrightPay Connect is designed to work with BrightPay Desktop only.

The Employee Self Service Portal, Manager Portal and Client Portal are included as standard features with BrightPay Cloud. For more information about the portals, [click here](#).

Pro tips:

- Want your employees to access the **Employees Self Service Portal**? Don't forget to review the settings in BrightPay Cloud and send login instructions to your employees.

 [Enabling Employee Access](#)  [Configuring Employee Self Service Options](#)

 [Inviting Employees](#)  [Employee Starter Pack](#)

- Want to give managers access to the Manager Portal? [Assign managers within the Employer Portal to grant them access to employee personal and leave information on the Manager Portal.](#)

 [Manager Portal Bureau Guidance](#)

- The Client Portal allows users to access employee and payroll details

 [Client Portal Overview](#)  [Client Portal Bureau Guidance Video](#)

 [Client Portal Employer Guidance](#)

- Want to use the Payroll Entry and Approval Requests in BrightPay Cloud?

 [Payroll Entry Request – Bureau Guidance](#)  [Payroll Approval Request – Bureau Guidance](#)

- Did you know that the historical payslips and HR resources can be seamlessly imported from BrightPay Connect to BrightPay Cloud?  [Learn More](#)



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Section 2:

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Additional Resources:

Explore our [Migration Hub](#) for a wide range of resources to support your transition.

Watch the [video tutorials](#) on BrightPay Cloud functionality

BrightPay Cloud Help Centre <https://payrollsupport.ie.brightsg.com/hc/en-gb/categories/39345842932881-BrightPay-Ireland-Cloud> includes articles and solutions to common questions, as well as our AI Assistant.

All this to guide you every step of the way!



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Section 3: Training invites (internal & client)



Below are email templates you can use to send training invitations — both internally to staff and externally to clients.

Internal team training:

Subject line: Upcoming Training - BrightPay Cloud Bureau Workflow

Copy:

Hi Team,

As part of our transition to BrightPay Cloud, we highly recommend watching the below training videos and read the guides to help you get the most out of BrightPay Cloud and ensure a smooth transition:

Product Overview: [BrightPay in Action](#)

Employee Self Service Portal Bureau Guidance: [View Here](#)

Employee Self Service Portal Overview: [Read Here](#)

Manager Portal Bureau Guidance: [Read Here](#)

Manager Portal Overview: [Read Here](#)

Client Portal Bureau Guidance: [View Here](#)

Client Portal Overview: [Read Here](#)

Please note these videos are for internal use only

This will cover:

- Key differences between Cloud and Desktop
- How to access and manage new portals in BrightPay Cloud - Employee Self Service Portal and Manager Portal
- Changes in reporting and audit tools

Please confirm when you have completed the videos.

[Your Name / Position]





Below are email templates your clients can use to announce the transition to BrightPay Cloud to their own clients.

Initial announcement email:

Subject line: We're Moving to BrightPay Cloud

Copy:

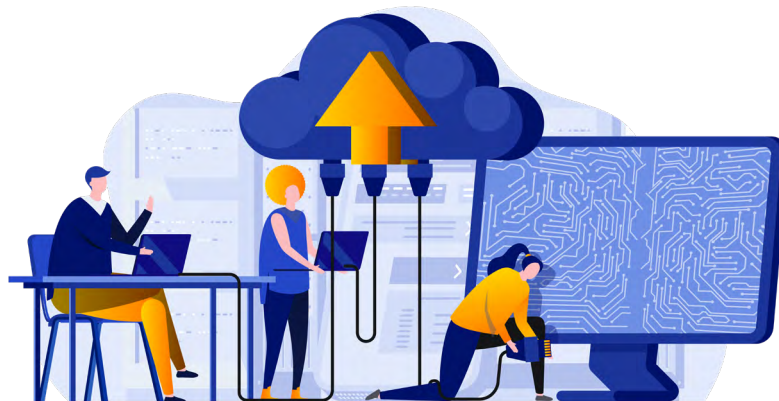
Hi [Client Name],

We're upgrading your payroll service to BrightPay Cloud from [insert date].

You'll benefit from:

- Secure Employer Portal access
- Real-time reporting
- Employee Self-Service functionality
- Easy leave requests and payslip downloads

Kind regards,
[Your Name / Team]



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Section 4: Client communication



Follow Up - Employee Self Service Activation Email:

Subject line: We're Moving to BrightPay Cloud – What You Need to Know

Copy:

Hi [Employee Name],

We're excited to let you know that we're moving our payroll system to BrightPay Cloud.

This change will give you easier access to your payslips and other payroll documents via a secure online portal. You'll also be able to request annual leave, update your details, and manage your payroll information from anywhere, at any time.

To help you get started, here's instructions that walks through the basics of using BrightPay Cloud: [Click here](#)

Employee Self Service Portal Video Tutorial: [Learn More](#)

What you need to do:

- Keep an eye out for an email invitation to create your BrightPay Cloud account.
- Follow the steps in the email to set up your login.
- Once set up, you can access your account at any time via:
<https://employee.brightpay.com/>

If you have any questions or need help getting started, please feel free to contact

[Insert Contact Name/Email].

Thanks,

[Your Name] [Your Position] [Company Name]



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Section 5: Key contacts guide



Technical Support: brightpayonlineiesupport@brightsg.com

Bureau/Portal Migration Support: brightmove@brightsg.com

Employee Queries: yourownemail.com

www.brightsg.com

