

# 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](#)



## 1 Section 1: Internal planning steps

### Purpose:

Establish your internal migration approach and ensure your team is fully prepared to transition clients, now that the new tax year has begun and BrightPay Desktop is no longer compliant with UK legislation..

### 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 now, ensuring a clean transition at the start of the 2026/27 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:

- Identify clients using CIS ([BrightCIS](#) is a separate product for CIS users).
- Identify 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](mailto:brightpaysales@brightsg.com)

**Set a transition timeline:** BrightPay Desktop reaches end of life after the 2025/26 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](#).

## 2 Section 2: Migrating to BrightPay Cloud: Step-by-step guide

### Step 1

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



[Learn more](#)



[See BrightPay in action](#)

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

### Step 2

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

*Pro tip:* You can migrate your companies 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. Log in using your BrightID

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.*

#### 2. Create your organisation

Once logged in, you will be asked to create your organisation. Here, you need to enter your organisation name and address, choose your payment plan, and add a payment method.

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

#### 3. Import your employer(s)

Select the option 'Import from BrightPay for Windows / Mac'. 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. If the employer data files are password protected, you will need to enter the passwords to import the companies. You can import up to 10 employers per batch.

*\*[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 and reports, along with the pay periods you've updated.

- **Do I need to re-enter my HMRC and Nest credentials in BrightPay Cloud?**

Yes, you'll need to re-enter the HMRC gateway and Nest credentials (if Nest is your pension provider). To do this, just click on the Settings icon in the top right corner, then go to the Submissions section.

## Step 3

### You're ready to start using BrightPay Cloud!

Explore our [Migration Hub](#) for a wide range of resources to support your transition. We also have helpful [video tutorials](#) and comprehensive [online documentation](#) to guide you every step of the way.



[Explore Migration Hub](#)

## FAQs:

- **How to invite additional users to my organisation?**

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

*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?

The Employee Self Service Portal, Manager Portal and Client Portal come as standard 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.



[Learn how](#)

Employee Starter Pack - [Click here](#).

- Want to give managers access to the Manager Portal? [Find out more](#).
- The Client Portal allows users to access employee and payroll details.
  - [Learn how to enable the Client Portal](#)
  - [View user video tutorials](#)



[Client Portal Bureau Guidance](#)



[Client Portal User Guidance](#)

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



[Payroll Approval Request](#)



[Payroll Entry Request](#)

Did you know that all payroll documents — including payslips, P60s, P11Ds, PBIKs, and HR resources — can be seamlessly imported from [BrightPay Connect into BrightPay Cloud](#)?

Need help with your migration? [Book a consultation today](#)

## 3 Section 3: Training invites (internal & clients)

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 to help you get the most out of BrightPay Cloud and ensure a smooth transition:

Product overview: [BrightPay in Action](#)

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

Client Portal User Guidance: [View here](#)

Employee Self Service Portal Overview: [Enabling Self Service Portal](#) / [Self Serve Portal Employee Guidance](#)

Manager Portal Overview: [View 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, Manager Portal and Client Portal
- Changes in reporting and audit tools

Please confirm when you have completed the videos.

[Your Name / Position]

### Client training:

**Subject line:** [Your Company Name] is Moving to BrightPay Cloud - Training Session

**Copy:**

Hi [Client Name],

We're excited to let you know that we'll be moving your payroll to BrightPay Cloud from [insert date]. To guide you through the changes and what to expect, we've created the following resources:

- [Client Portal User Guidance](#)
- [Payroll Entry Employer Guidance](#)
- [Payroll Approval Employer Guidance](#)

Here's what we'll cover:

- Your new Employer Portal
- Approving leave, accessing reports
- Payroll Entry & Approval Requests
- FAQs on logging in, permissions, and downloading documents

Kind regards,

[Your Name / Company]

## 4 Section 4: Client communication templates

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]

### 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, P60s, 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](#)

You can also find guidance on how to use the Employee Self Service Portal [here](#).

**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/> or by downloading employee app on [iOS](#) / [Android](#).

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]

## 5 Section 5: Key contacts guide

**Technical Support:** [brightpayonlineuksupport@brightsg.com](mailto:brightpayonlineuksupport@brightsg.com)

**Bureau/Portal Migration Support:** [hellomigration@brightsg.com](mailto:hellomigration@brightsg.com)

**Employee Queries:** [yourownemail.com](mailto:yourownemail.com)