



STEP-BY-STEP GUIDE

A woman with long brown hair and glasses, wearing a green blazer, is sitting at a desk in an office. She is looking at a computer monitor and has her hand resting on her chin, appearing to be in deep thought or listening intently. The background shows a blurred office environment with windows.

# Importing from Thesaurus Payroll Manager Mid-Year to BrightPay Cloud

To sign up to BrightPay Cloud click here:



Sign Up

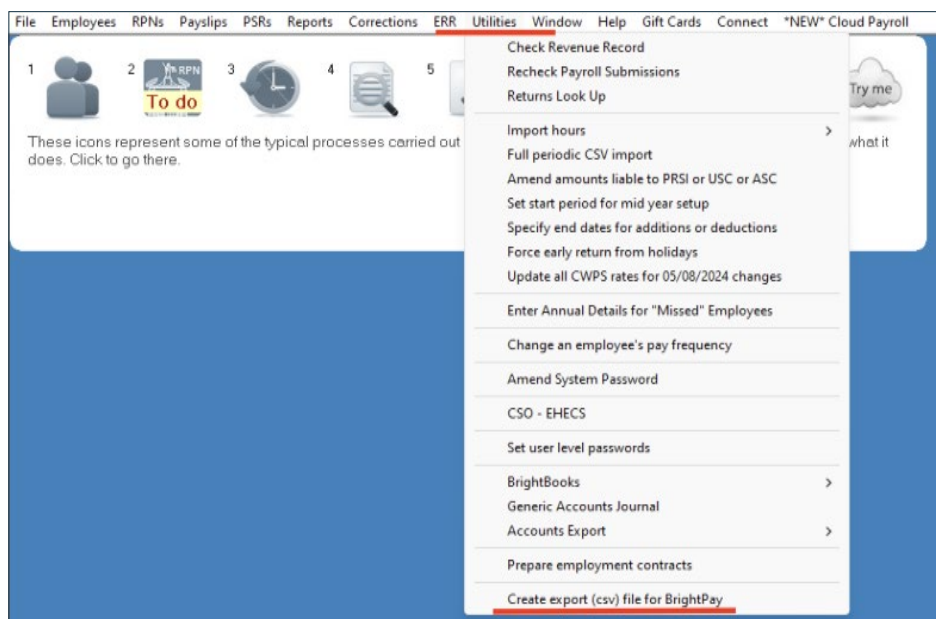
BrightPay Cloud facilitates the importing employee information directly from a CSV Import or from Revenue Payroll Notification (RPN).

## 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 Thesaurus Payroll go to Utilities menu> create export (csv) file for BrightPay. Click the button **CSV File** and save the file to a location of your choice

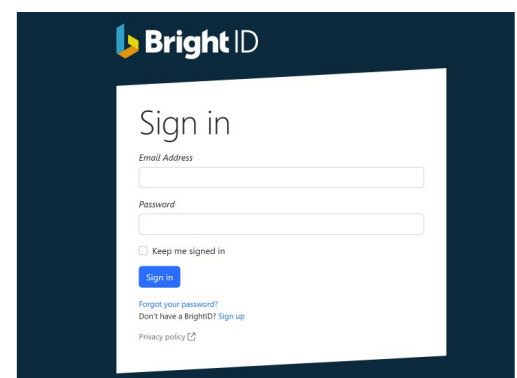
If you run both weekly and monthly payroll in Thesaurus Payroll Manager, you will need to perform this process **twice** - once for weekly and once for monthly



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

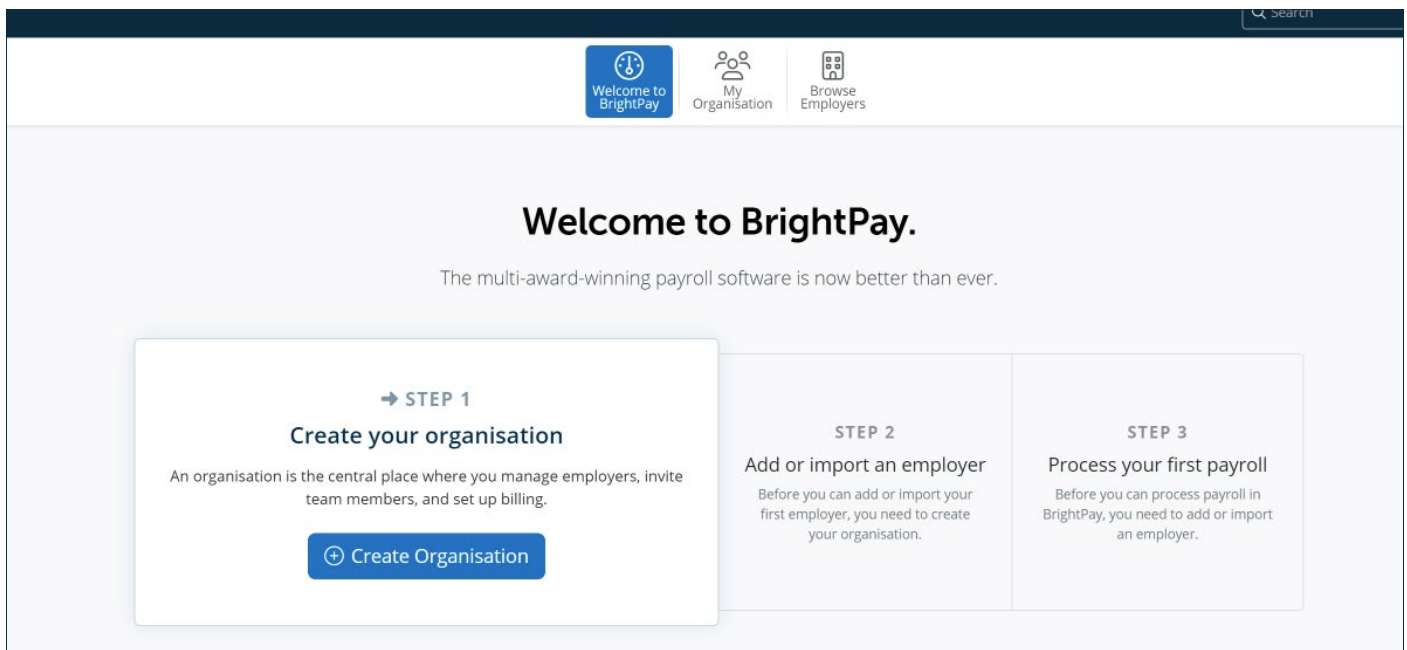
As a new user, when you log into BrightPay, on the Welcome to BrightPay you will have a step-by-step guide on how to set up your information (3 steps). Sign into BrightPay by using your existing BrightID. If you don't have a Bright ID, click Sign up and follow the steps.



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.



The screenshot shows the BrightPay welcome interface. At the top, there's a navigation bar with a search icon and three menu items: 'Welcome to BrightPay', 'My Organisation', and 'Browse Employers'. The main heading is 'Welcome to BrightPay.' followed by the tagline 'The multi-award-winning payroll software is now better than ever.' Below this, there are three steps outlined in boxes. Step 1, 'Create your organisation', is highlighted with a blue border and a '→ STEP 1' label. It includes a description: 'An organisation is the central place where you manage employers, invite team members, and set up billing.' and a prominent blue button labeled '+ Create Organisation'. Step 2 is 'Add or import an employer' and Step 3 is 'Process your first payroll', both with brief explanatory text.

→ STEP 1

### Create your organisation

An organisation is the central place where you manage employers, invite team members, and set up billing.

+ Create Organisation

STEP 2

Add or import an employer

Before you can add or import your first employer, you need to create your organisation.

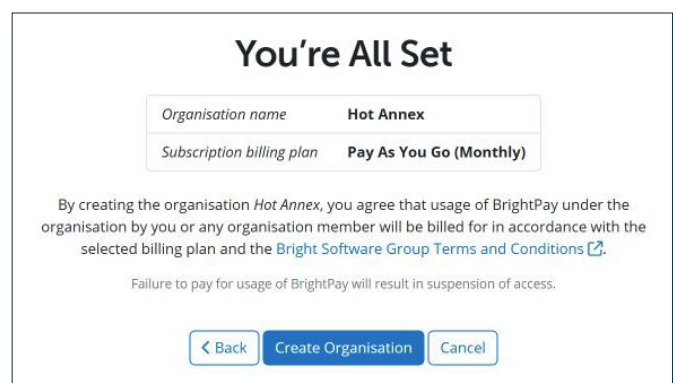
STEP 3

Process your first payroll

Before you can process payroll in BrightPay, you need to add or import an employer.

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.



The screenshot shows the 'You're All Set' confirmation screen. It features a table with two rows: 'Organisation name' with the value 'Hot Annex' and 'Subscription billing plan' with the value 'Pay As You Go (Monthly)'. Below the table, there is a paragraph of text stating that by creating the organisation 'Hot Annex', the user agrees to the terms of use and billing plan. At the bottom, there are three buttons: '< Back', 'Create Organisation' (highlighted in blue), and 'Cancel'.

### You're All Set

Organisation name	Hot Annex
Subscription billing plan	Pay As You Go (Monthly)

By creating the organisation *Hot Annex*, you agree that usage of BrightPay under the organisation by you or any organisation member will be billed for in accordance with the selected billing plan and the [Bright Software Group Terms and Conditions](#).

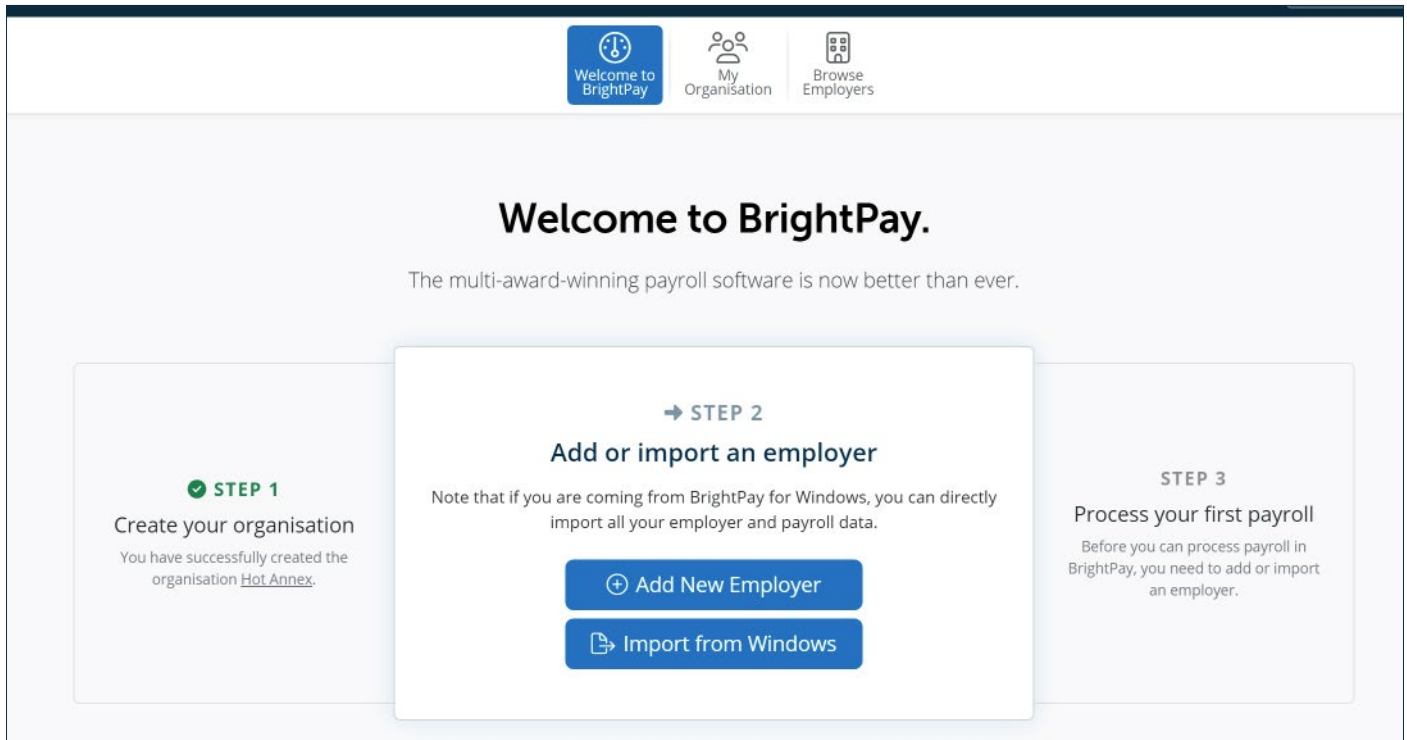
Failure to pay for usage of BrightPay will result in suspension of access.

< Back Create Organisation Cancel

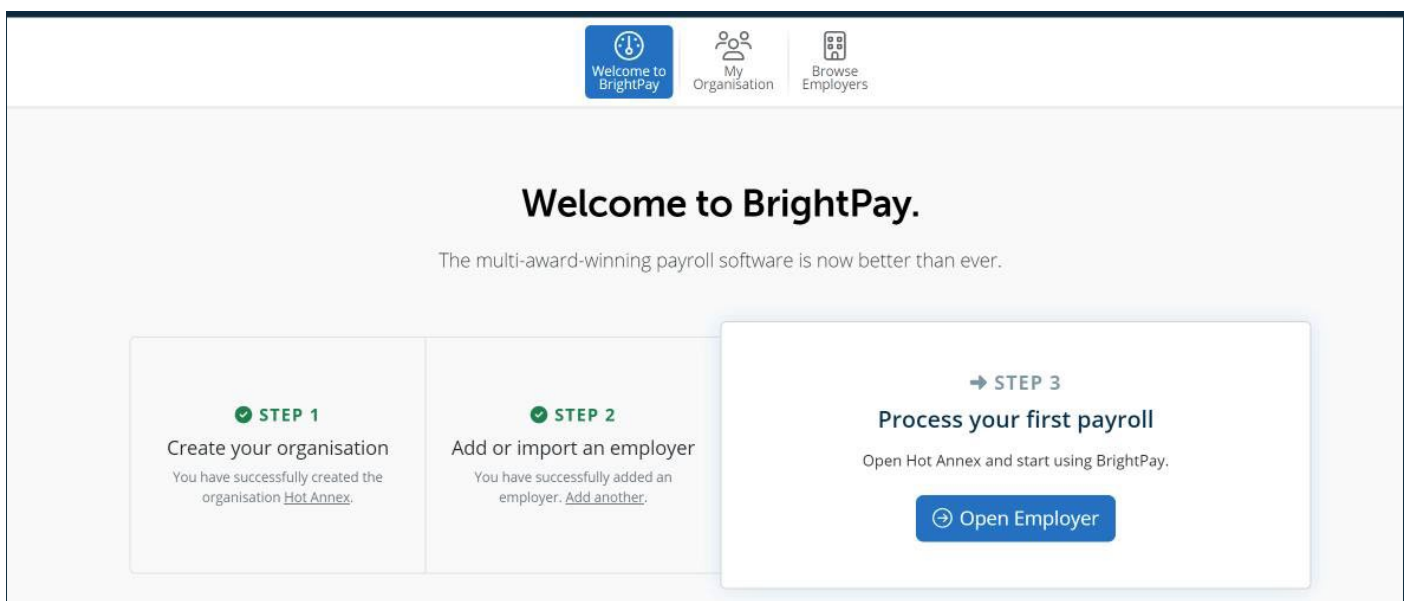
- 4 In order to create your new employer select the Add New Employer option, [Adding an Employer Manually - BrightPay Documentation](#)

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 Thesaurus go to File > Amend Company Details.



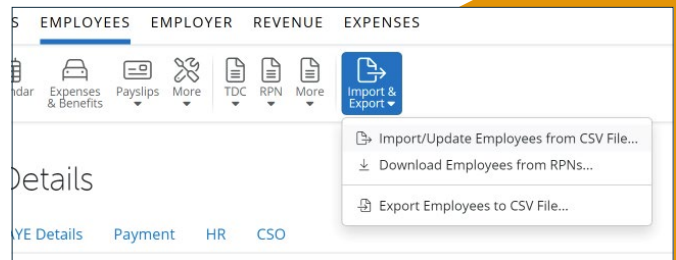
- 5 Select Open Employer.





6

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



7

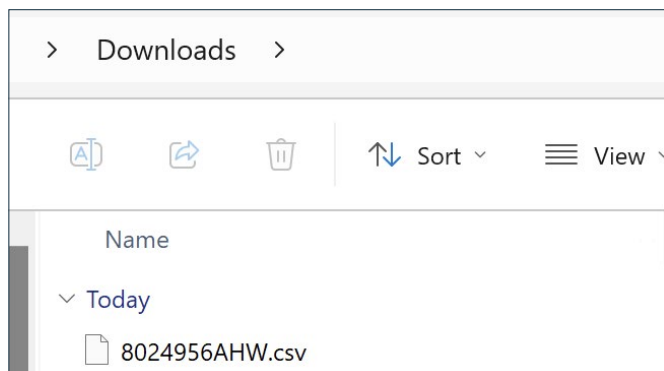
Click select a CSV File to Upload and Browse to the location of your CSV file, select it and press 'Open'.

### Import Employees from CSV File

Select a CSV file to upload (and optionally edit the content before continuing). Alternatively, enter/paste CSV content directly without uploading a file.

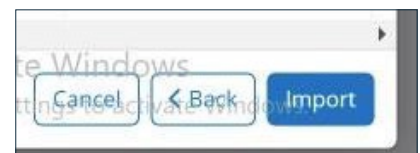
Select a CSV File to Upload

Upload a CSV file, or enter/paste CSV content here directly.

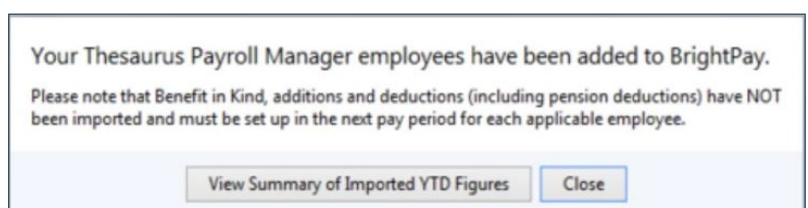


On successful completion of the import, BrightPay will give you an option to view a report of the year to date figures imported from Thesaurus Payroll Manager. Simply click on **View Summary of Imported YTD Figures** to view/print this.

BrightPay will automatically match the column headings for you. Simply click **Import** to proceed.



Remember to repeat this process if you created two CSV files in Thesaurus Payroll Manager (one for weekly, one for monthly).



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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.

## Enabling Employee Access to Self Service Portal

BrightPay provides a web-based portal where employees can browse and download their history of payslips and other payroll documents, view their payroll calendar, including annual leave and parenting leave, and view their personal details.

You can enable access to the Employee Self Service Portal globally for all employees or at an individual employee level.

There are two ways for an employer/bureau to set up an employee' access to self service portal:

### 1 Select all Employees to have access to Self Service Portal

- 1) Within your BrightPay organisation, open the employer you require.
- 2) Go to > Employer.
- 3) Choose 'Employee Portal > Settings'.
- 4) Select 'Employer is available in the employee portal' to make any required changes and click 'Save'.

The screenshot displays the 'Employee Portal Settings' interface. At the top, a navigation bar includes tabs for PAYROLL, ANALYSIS, EMPLOYEES, EMPLOYER (selected), REVENUE, and EXPENSES. Below the navigation bar, a row of icons represents various settings: Edit Employer Details, Employee Portal, Settings, More, Employer Calendar, Departments, Hourly Rates, Daily Rates, Piece Rates, Addition Types, Deduction Types, Pension Schemes, Savings Schemes, and Bank Accounts. The main content area is titled 'Employee Portal Settings'. A toggle switch is set to 'On', with the text 'Pond Ltd is available in the employee portal.' and a red arrow pointing to it. Below the toggle, a note states: 'To access their employment details, employees should log in to the employee portal using a Bright ID for the email address that is set for them.' The 'OPTIONS' section contains two checked items: 'Enable document email notifications' (with a sub-note about automatic email) and 'Enable calendar' (with a sub-note about leave management). The 'EMPLOYEE REQUESTS' section indicates 'Employee requests are enabled' with a 'Change' link. The 'GLOBAL MANAGERS' section shows a dropdown menu with 'Gordan Getty' selected and a '+ Add global manager' link. The 'DOCUMENT AVAILABILITY' section at the bottom asks 'When should finalised payslips be available in the employee portal?' with a dropdown menu set to 'On the pay date' and a 'from' field set to '08:00'.

## 1 Give an Individual Employee access to Self Service Portal

- 1) Within your BrightPay organisation, open the employer you require.
- 2) Go to > Employees > Select an Employee > Edit Details

- 3) Choose the 'HR' tab.
- 4) Ensure an employee has an email address entered in their profile in order to enable self-service for this employee.

**Bonnie O'Sullivan Edit Details**

Personal Employment PAYE Details Starter Details Payment **HR** CSO

**EMPLOYEE PORTAL**

Please enter an email address to enable access to the employee portal.

**ADDITIONAL INFORMATION**

Nationality  Passport number

**REPORTING**

Reports to

[+ Add manager](#)

- 5) Select 'Enable access to the employee portal' in order to allow the individual employee access to their self service portal and click 'Save'.

**Bonnie O'Sullivan Edit Details**

Personal Employment PAYE Details Starter Details Payment **HR** CSO

**EMPLOYEE PORTAL**

☒ Enable access to the employee portal. Allow employee to access her employment with Pond Ltd in the employee portal (using Bright ID with email address mail@mail.com).

**ADDITIONAL INFORMATION**

Nationality  Passport number

**REPORTING**

Reports to

[+ Add manager](#)

Notes