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
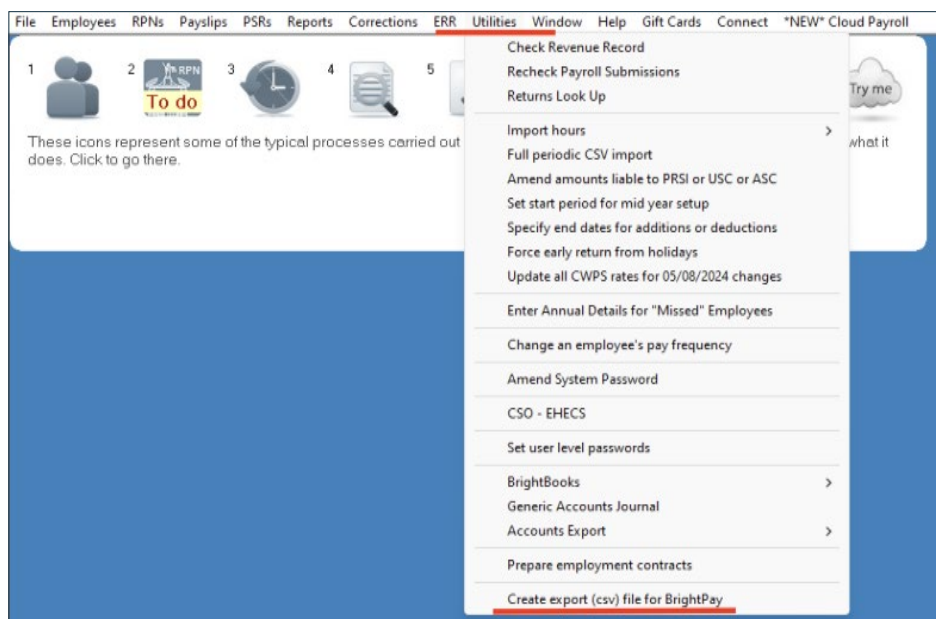
Do not open the CSV file, as Excel will format items such as sort code and account numbers and they may no longer be importable into BrightPay.
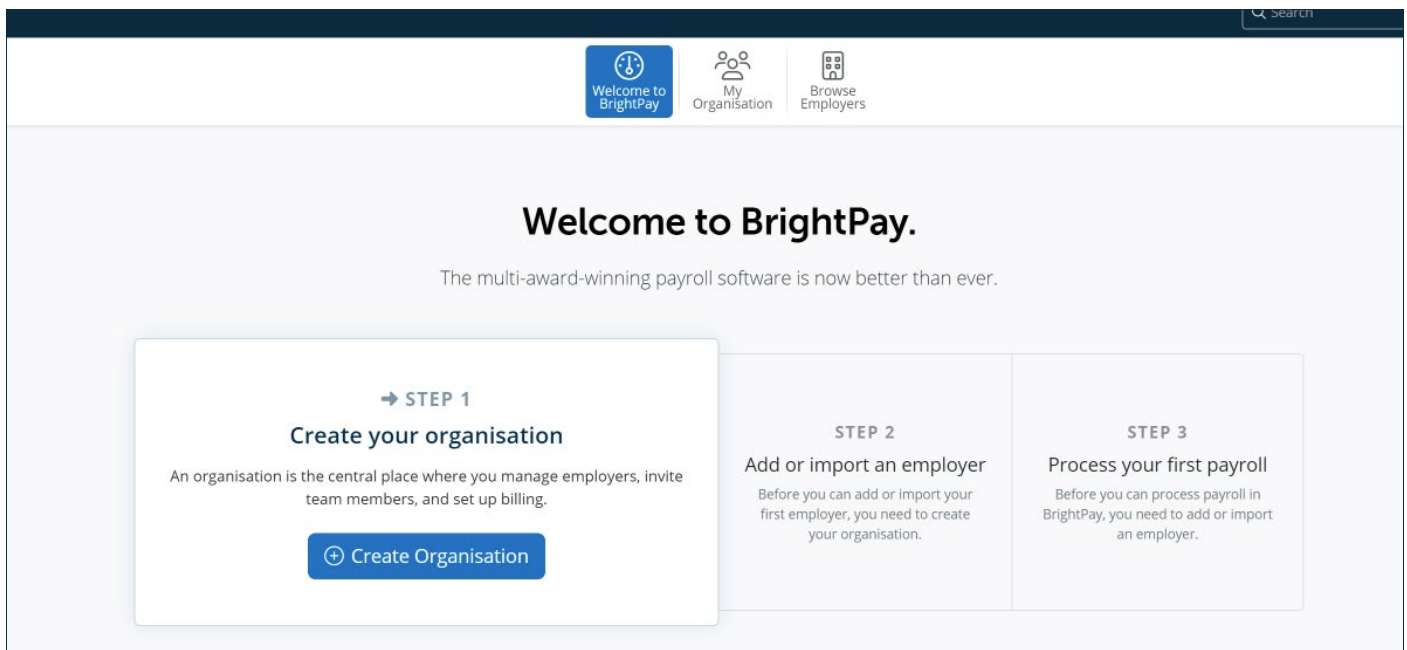
2

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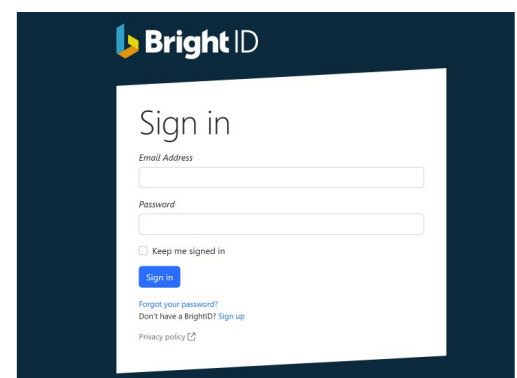
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Once signed into BrightPay Cloud you will need to set up an Organisation.

An Organisation is where employers, team members and billing are managed.
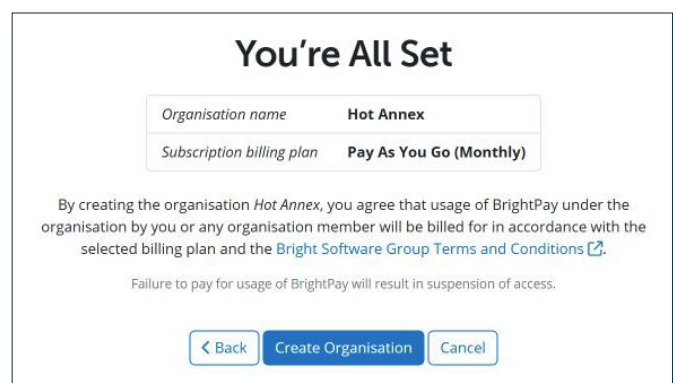
To set up an Organisation enter your organisation's details, choose your payment plan and add a payment method.

Once all the Organisation's details are entered when you select 'Create Organisation' the organisation will be created.

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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.
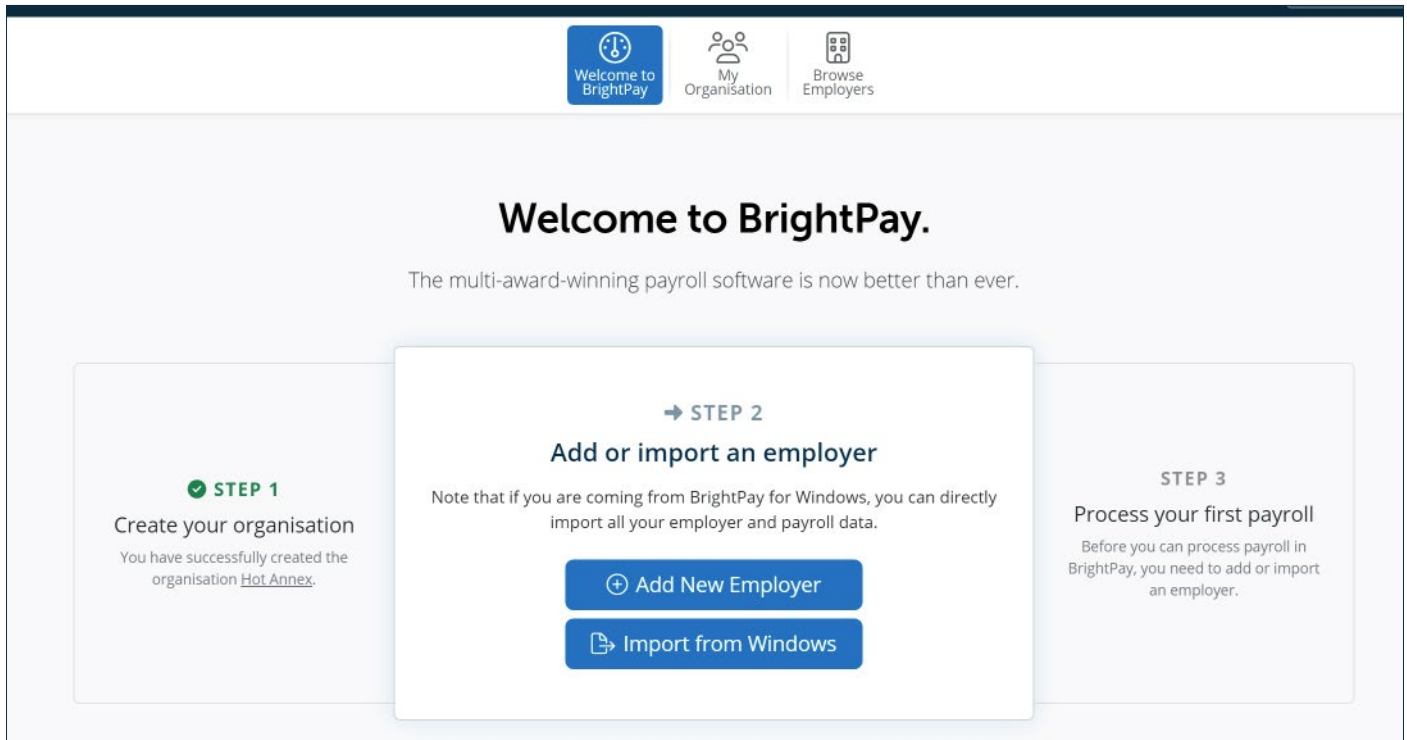
5 Select Open Employer.
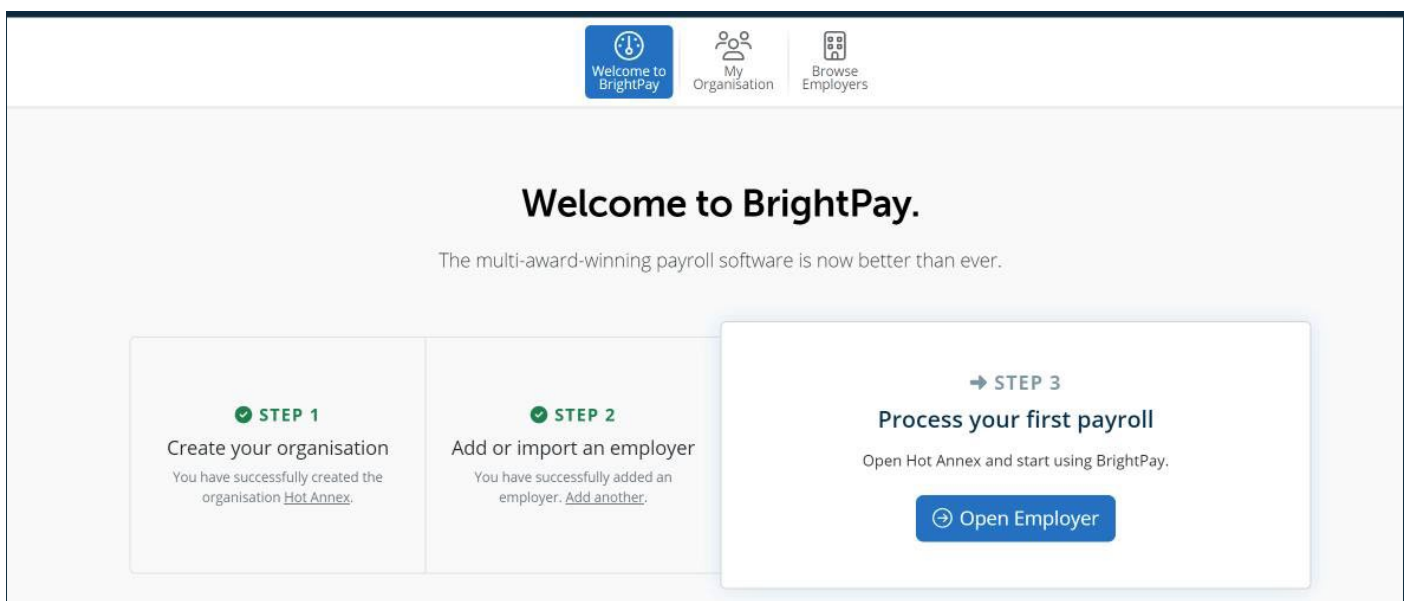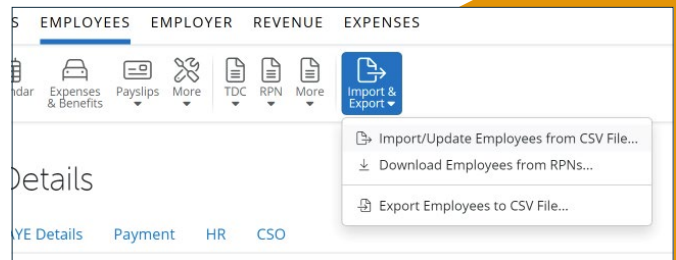
6

Once you have entered and saved your employer information, go to Employees tab > Import & Export > Import/Update Employees from CSV File.
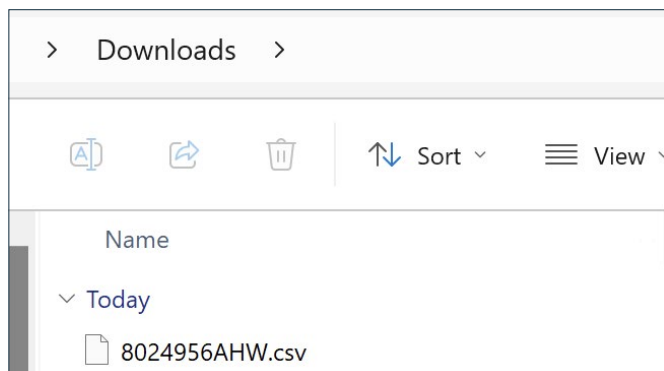
7

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

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.
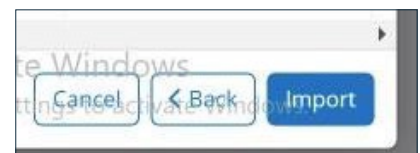
Remember to repeat this process if you created two CSV files in Thesaurus Payroll Manager (one for weekly, one for monthly).
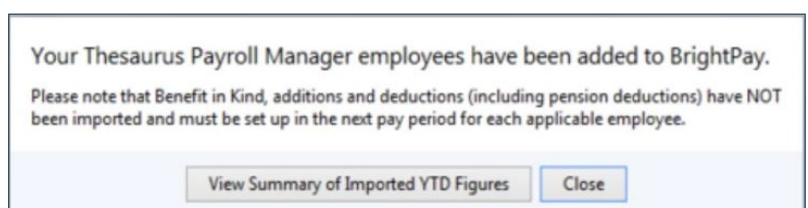
8

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'.

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.

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