# paiyroll® for Brightpay users

Setup paiyroll® · https://paiyroll.com/kb/paiyroll-for-brightpay-users/

Follow this guide if you are moving from Brightpay and want to know where to find the feature in paiyroll®. This is a high-level table; for more information, please search for the paiyroll® topic. Also, please note that some features require setup before they are available.

## Payroll

| BrightPay | paiyroll® left menu | paiyroll® top menu | Notes |
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| Payslip | **Pay Item Editor**<br><br>Edit values to make changes, then click **Update/View Payslip** to commit changes and view the result.<br><br>**Create Pay Item** to add a new pay type. | **Setup** > Pay Definitions to add a new Pay Definition to the company - the majority will be based on *Payment*, *Deduction* or *Per unit* Pay Templates.<br><br>Once added, the Pay Item is available in the Pay Item Editor **Create Pay Item**. | Taxable configuration (PAYE/NIC/Pension) is altered in Setup > Pay Definition **Outputs** tab. |
| Summary | **Pay runs** > View > Summary tab | | After any Payrun Redo |

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| Finalise Payslips | **Pay Runs** > **Redo** after any changes.<br><br>Finalise is not required as all documents are automatically available for Client and Employee Self-service.<br><br>**Pay Runs** > Approve when ready to submit. | | If required, you can click **Hide live payslips and in-progress documents from workers** or **Suppress watermarks** [make them appear final] in Companies > Update > Preferences.<br><br>Parallel run imports automatically set Dry-run [no live submission], which is auto-cleared after approval. |
| Print/ Export Payslips | **Documents** | | After any Payrun *Redo*, click the document name to *view* it or the icon on the left to *download* it. |
| Pay Employees | **Documents** | | After any Payrun *Redo*, click the bank file name to *view* or the icon on the left to *download* it.<br><br>Documentation > GB migration and other tasks > BACS and Faster Payment files to see bank file setup instructions. **Setup** > Report Definitions> Add > Bank File > Add. |
| Re-open Payslips | **Pay runs** > Rewind | | |
| Filter | Use the Company, Status, Search [for any employee] and Department selectors above the Pay Item Editor. | | |

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| More > Import Pay Records from CSV file | **Data feeds** > Upload shift CSV or Columns from a file if configured. | **Tools** > Upload Pay Item workbook. | **Tools** > Create Pay Item workbook at any time.<br><br>**Support** section *Uploading data from Spreadsheets* |
| More > Minimum Wage Report | **Documents** | | **Setup** > Report Definitions> Add > GB Wage Analysis > Add.<br><br>Available after any Payrun *Redo* |
| Coding Notices | Automatically downloaded in the payroll cycle. | Enter credentials to enable:<br><br>*Bureau*: Setup > Credentials > Add... > GB HMRC DPS<br><br>*Employer*: Setup > Report Definitions > GB HMRC DPS<br><br>Dashboards > Payroll Debbie > select the company to view the collection dates on the Data-feeds tab. | **Data feeds** > Select company:<br><br>**View** to see any notices that applied automatically during the payroll cycle.<br><br>**Start** to initiate a download. |

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| Journal | Automatically submitted upon Pay run approval, and manual posting is not required.<br><br>View what will be submitted in **Pay Run** > View > Reports tab > GB Xero/ FA/ QB/ etc. > View button and scroll down. | | **Setup** > Report Definitions> Add > GB Xero/ FA/ QB, etc > Add. Then click **Update** to *Grant* and configure.<br><br>There is a mirror journal in **Documents** > Pre-approval summary2 > Journal Sheet. |
| Redefine Weeks | | **Setup** > Schedules > Update, then clear the Enabled checkbox. Update the schedule to make changes. Don't forget to re-enable. | |

## Analysis

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| Analysis | **Analytics** | | Support has guides to generate any report across multiple years |

## Employees

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| New Employee | **Employees** > Add...<br><br>**Data feeds** > GB Upload workers CSV to upload from a file if configured. | | Enter all required details on the Main, Postal and Bank tabs. The Tax tab currently requires Weekly Hours worked, DoB, Gender and NI |
| Edit Details | **Employees** > Search > Update | | Search for an employee using part of their name or works_id |
| Calendar | | | Automatically created from workflows.<br>Support and search "SSP" or "Holidays". |
| Automatic Enrolment | No action is required on each Pay Run as these steps are all automated. | **Setup** > Schemes to configure. | Support search "NEST API" if API Opt-outs and Submission are required. We recommend not adding these until go-live. |
| Attachment Orders Expenses & Benefits | | **Setup** > Pay Definitions to add a new Pay Definition to the company - the majority will be based on *Payment*, *Deduction* or *Per unit* Pay Templates; Once added, the Pay Item is available in the Pay Item Editor +Create Item. | Taxable configuration (PAYE/NIC/Pension) is altered in Setup > Pay Definition **Outputs** tab. |
| P45/P60 | Automatically available in **Documents** for Admin, Clients and Employees. | | Available after a Pay run **Redo** |

## Employer

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| Edit Employer Details | **Companies** > Update | | |
| Departments | | **Setup** > Departments | |
| Hourly/ Daily/ Piece Rates<br>Addition/ Deduction Types | | **Setup** > Pay Definitions> Add... | |

## HMRC Payments

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| HMRC Payments | **Documents** > Pre-approval summary2 > GB P32 Sheet for monthly schedules. | **Tools** > All Tools > **Company P32 Summary** for all other/mixed schedules | |

## RTI

| BrightPay | paiyroll® left menu | paiyroll® top menu | Notes |
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| New Send | Automatically created and submitted upon Pay run approval, and no manual steps are required.<br><br>**Pay Run** > View > Reports tab > GB RTI FPS > View button and scroll down to see a summary of what will be submitted. | When ready to go live, add credentials:<br><br>*Bureau*: Setup > Credentials > Add...<br><br>*Employer*: Setup > Report Definitions > GB RTI FPS and EPS > Update | RTI files can be viewed in **Documents**. |

## Pension

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| Send Submission | Automatically submitted upon Pay run approval, and no manual steps are required.<br><br>**Pay Run** > View > Reports tab > GB Enrol and Contribute > View button and scroll down to see a summary of what will be submitted. | When ready to go live, add credentials:<br><br>*Bureau*: Setup > Credentials > Add...<br><br>*Employer*: Setup > Report Definitions > GB Nest Enrol and Contribute<br>GB NEST Opt-Out > Update | Pension files can be viewed in **Documents**. |
| Automatic Enrolment (AE) | All AE tasks are performed automatically by Debbie early in the pay cycle or during the pay run, and no user intervention is required. | | Three-year re-enrollment is automated. **Companies** > Update > Tax tab to enter the last enrolment date. |
| Journey report | **Documents** > Pre-approval summary2 > GB AE Sheet | | Importers set all migrated AE Status. |
| Letters | Automatically e-mailed upon approval. | | Can be viewed in **Documents** > GB Pension Letters. |
| Schemes<br>New Scheme<br>Delete | **Pay Item Editor** to edit AE values. Note that Company % is generally set on the Scheme, but can be overridden. | **Setup** > Schemes to configure any number of AE schemes. | |

# CIS

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| Payments | **Pay Item Editor**<br><br>Create Pay Item > Shift (CIS) 1 Materials (CIS) 1 | | **Support** and search "Setup CIS" for a complete guide. |
| Subcontractors | **Employees** > Update > Tax tab and select CIS > Sole Trader/ Partnership/Trust/ Company and other details. | | |
| Contractor | Company > Update > Tax tab to enter UTR. | | |
| Contractor Verify | **Data feeds** > GB CIS Verify > Start | Setup > Report Definitions > Add... > GB CIS Verify to set up. | |
| Submissions | Automatically submitted upon Pay run approval, and no manual steps are required. | Setup > Report Definitions > Add... > GB CIS300 to set up. | Automatically submitted on Pay run approval. CIS300 files are viewed in **Documents**.<br><br>You can also add a new schedule if required. |