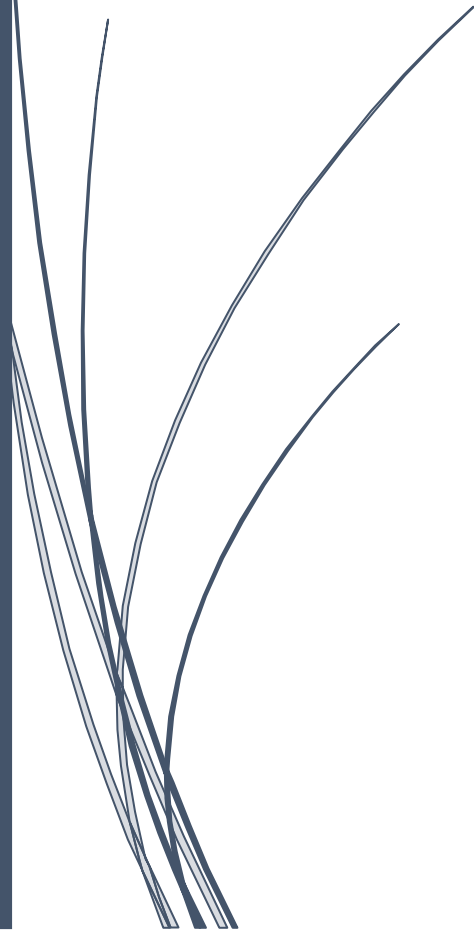




# Employee Migration User Guidelines



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# Migrating your employees to Payroo

Migration to our application is very simple. When you want to switch to our payroll system from any other manual system or software package you will need to migrate your existing employees' details on to our system. You can migrate all your employees' in one shot using a spreadsheet at any point in time within a tax year.

Our application supports 2 methods of employee migration:

- (i) Create employee record using the Add New Employee option or using a spreadsheet.
- (ii) Create and import all the employees' pay details in one shot using the spreadsheet.

The employee migration spreadsheet is user friendly and the columns are linked to a quick help facility for your assistance. For further clarifications you can also refer to our well defined employee migration instruction document.

## Points to remember:

- ✓ Refer to the quick tips linked with the spreadsheet columns for assistance.
- ✓ Also refer to the instruction document when you fill in the employee migration spreadsheet.
- ✓ Review each and every entry you make in the spreadsheet to avoid mistakes.
- ✓ Save the spreadsheet in a CSV format because you can only upload CSV files.

# How to import?

## 1 Employee migration process for different Payroo applications

We now look into how to import employee details to the two different applications of Payroo. There isn't any much difference in the procedure, only some variation in the initial steps that you need to follow for the two applications (Payroo Star, Payroo Pay Bureau). Follow the appropriate procedure for the Payroo application you are using.

### 1.1 Payroo Star Payroll

Go to 'Import data' sub menu under 'Others' menu in the tasking zone of Payroo Star Payroll. The 'Import Data' option allows you to import the employee data of the particular employer.

#### Road Map:

*Others → Import Data*



**Fig 1.1.1 Standard Payroo Import data**

### 1.2 Payroo Pay Bureau

Bureau application allows you to migrate your employees' in bulk. Your Employer/Client/Branch reference number is used as a key to identify the different clients. This helps you to migrate multiple clients' employees' in a single upload process.

Employees' can be migrated into the Bureau application in two different ways

(i) **'Import Data'** under 'Bureau Details' from the Bureau main page. Here you can import employees' for any Client/Employer under Bureau at the same time.

**Road Map:**

*Bureau main page → Bureau details → Sign In password → Import Data*

Row No.	Client Name	Admin Payrun	Current Employees	Status	Process	Process	Remove Client	P11D Tax Year	PAYE / CIS Tax Year
1	<b>Demo Employer Ltd.</b>	<a href="#">Enter</a>	21	Active	<a href="#">P11D</a>	<a href="#">CIS</a>		2018 - 19	2018 - 19
2	Demo Client Ltd. - 2	<a href="#">Enter</a>	65	Active	<a href="#">P11D</a>	<a href="#">CIS</a>	<a href="#">Remove</a>	2018 - 19	2018 - 19
3	Demo Client Ltd. - 3	<a href="#">Enter</a>	12	Active	<a href="#">P11D</a>	<a href="#">CIS</a>	<a href="#">Remove</a>	2018 - 19	2018 - 19
4	Demo Client Ltd. - 4	<a href="#">Enter</a>	44	Active	<a href="#">P11D</a>	<a href="#">CIS</a>	<a href="#">Remove</a>	2018 - 19	2018 - 19
5	Demo Client Ltd. - 5	<a href="#">Enter</a>	32	Not Active	<a href="#">P11D</a>	<a href="#">CIS</a>	<a href="#">Remove</a>	2018 - 19	2018 - 19
6	Demo Client Ltd. - 6	<a href="#">Enter</a>	65	Active	<a href="#">P11D</a>	<a href="#">CIS</a>	<a href="#">Remove</a>	2018 - 19	2018 - 19
7	Demo Client Ltd. - 7	<a href="#">Enter</a>	12	Active	<a href="#">P11D</a>	<a href="#">CIS</a>	<a href="#">Remove</a>	2018 - 19	2018 - 19
8	Demo Client Ltd. - 8	<a href="#">Enter</a>	44	Active	<a href="#">P11D</a>	<a href="#">CIS</a>	<a href="#">Remove</a>	2018 - 19	2018 - 19

**Fig 1.2.1 Bureau Main Page 1**

Bureau Contact Details	<a href="#">View / Edit</a>	Bureau Customisation	<a href="#">View / Edit</a>
Bureau Own Payroll	<a href="#">Maintain</a>	Bureau Own P11D	<a href="#">Maintain</a>
Bureau System Administrator Details	<a href="#">View / Edit</a>	Bureau System User Details	<a href="#">View / Edit</a>
Former Clients	<a href="#">View / Edit</a>	Client System User Internet Account	<a href="#">View / Edit</a>
Consolidated Reports	<a href="#">View / Edit</a>	Support Request	<a href="#">Enable</a>
<b>Import Data</b>	<a href="#">Enter</a>	White Label Customisation	<a href="#">Customise</a>
Bureau / Client HMRC E-Filing Setup	<a href="#">Enter</a>	Auto DPS Report (Batch)	<a href="#">View Report</a>
		DPS Notice and Auto-Update Setup	<a href="#">Setup</a>

**Fig 1.2.2 Bureau Import Data Option 1**

(ii) You can also import the Employee details for a specific Client/Employer. To achieve this, follow the road map below.

**Road Map:**

Bureau Main Page → Admin Payrun → Enter Link(Corresponding to the specific Client Name) → Others → Import

**Bureau Main Page**

**Demo Employer Limited**

Good Afternoon Mr. Robert Redford, Tax Period - Year: 2018 - 19  
 Start Date: 06/04/2018 End Date: 05/04/2019 Date/Time: 03/04/2018 14:42:56

Click here for RTI Tutorial

[Bureau Details](#) [Manage Clients](#) [Batch Process](#) [Admin Payrun](#)

Row No.	Client Name	Admin Payrun	Current Employees	Status	Process	Process	Remove Client	P11D Tax Year	PAYE / CIS Tax Year
1	<b>Demo Employer Ltd.</b>	<b>Enter</b>	21	Active	P11D	CIS		2018 - 19	2018 - 19
2	Demo Client Ltd. - 2	Enter	65	Active	P11D	CIS	Remove	2018 - 19	2018 - 19
3	Demo Client Ltd. - 3	Enter	12	Active	P11D	CIS	Remove	2018 - 19	2018 - 19
4	Demo Client Ltd. - 4	Enter	44	Active	P11D	CIS	Remove	2018 - 19	2018 - 19
5	Demo Client Ltd. - 5	Enter	32	Not Active	P11D	CIS	Remove	2018 - 19	2018 - 19
6	Demo Client Ltd. - 6	Enter	65	Active	P11D	CIS	Remove	2018 - 19	2018 - 19
7	Demo Client Ltd. - 7	Enter	12	Active	P11D	CIS	Remove	2018 - 19	2018 - 19
8	Demo Client Ltd. - 8	Enter	44	Active	P11D	CIS	Remove	2018 - 19	2018 - 19

**Fig 1.2.3 Bureau Main Page 2**

**Employer / Setup** **Employee** **E-Filing RTI** **PayRun** **Finance** **Pension** **Reports** **Others**

**Dashboard - Weekly Payrun**

**Demo Employer Limited**

**You are now in RTI Payroll ( Tax Year : 2018 - 19 )**

For more information on RTI (Real Time Information) click on our FAQ 9 Section, FAQs can be found at the TOP RIGHT HAND CORNER of our web page.

Week 42 Current Tax Period 19 x Year

Reset if to View / Process other Pay period

**To Process Pay Period Week 01 ( 02-04-18 to 08-04-19 )**

Process Payrun	Payrun Processed	Pre-YTD Reports	YTD Committed	FPS E-filed	EPS E-filed	Bulk Payrun	Employer Report
<a href="#">Process &gt;</a>	✓	✓	✓	✓	✗	<a href="#">Process &gt;</a>	<a href="#">View / Print</a>

Click below to process other pay frequency

[Monthly](#) [Weekly](#) [2 Weekly](#) [4 Weekly](#) < Select other pay Frequency >

**Others** dropdown menu:

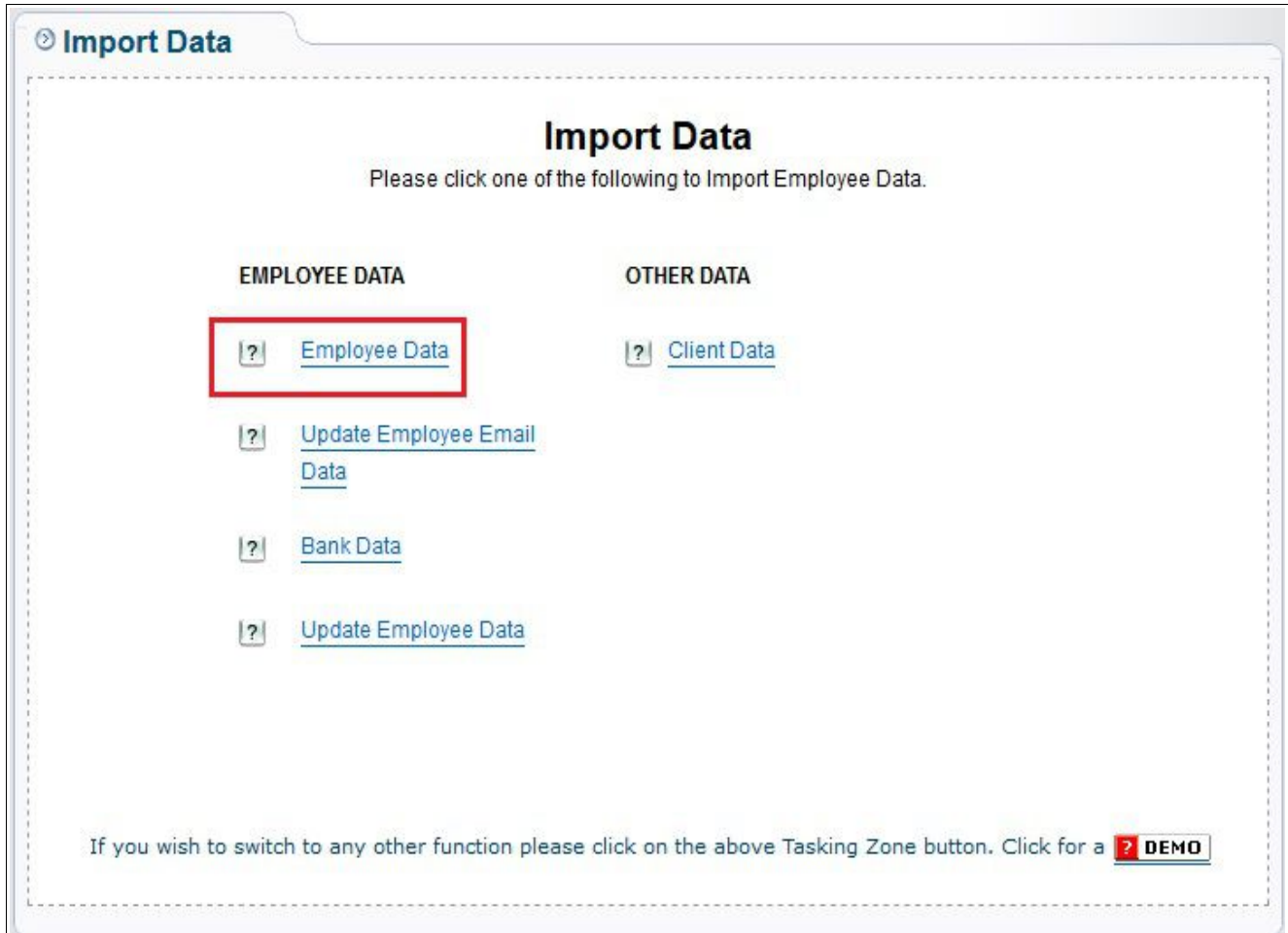
- De-List Employee
- Recover Employee
- Rollback
- Import Data**
- Amend AE Assessment Status
- Switch to Other Application
- Start New Tax Year
- DPS P6, P9, SL1, SL2 Manual Download
- Export Data

**Fig 1.2.4 Bureau Import Data Option 2**

## 2 Download spreadsheet procedure for employee migration

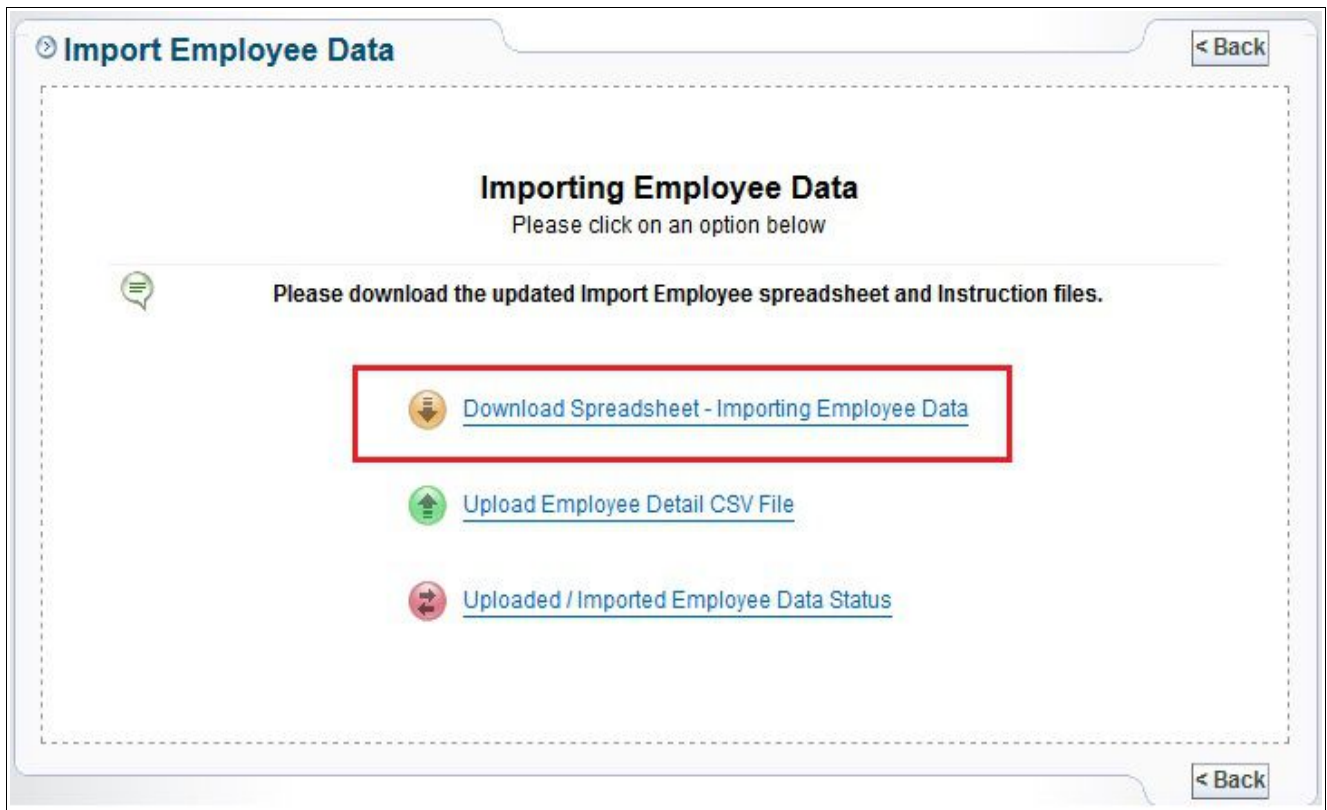
All the procedures hereafter are the same for the two applications of Payroo. Follow the instructions below for any application.

**Step 1:** Click on the 'Employee Data' link from the Import data page.



*Fig 2.1 Import data*

**Step 2:** Please thoroughly read all the data importing instructions before you proceed to download the template and then click on the 'Click To Continue' button. Now click on 'Download Spreadsheet-Importing Employee Data'.



**Fig 2.2 Importing Employee Data**

**Step 4:** Select the appropriate employee template.



**Fig 2.3 Employee Template**

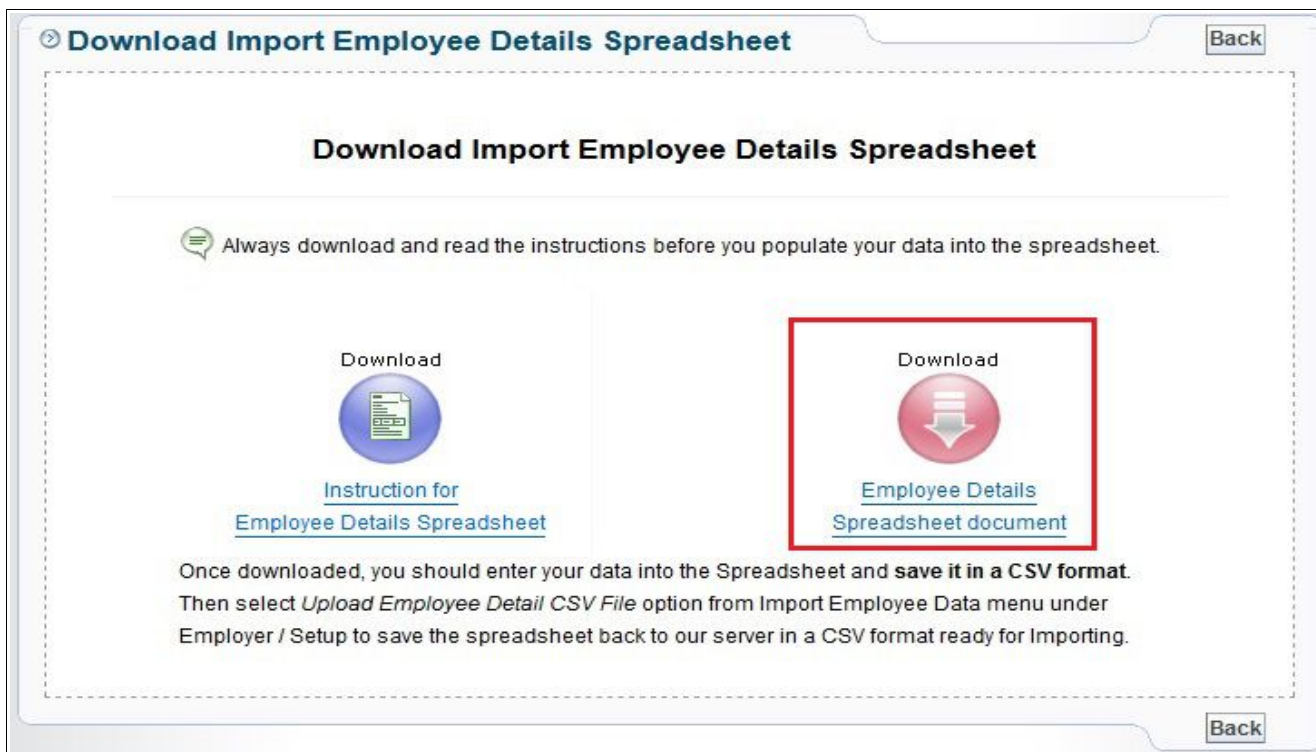


**Step 5:** Click on the 'Instruction for Employee Details spreadsheet' link and download the document. Thoroughly read all the instructions before you proceed to download and fill in the employee migration spreadsheet.



*Fig 2.4 Download Instruction*

**Step 6:** Now click on the 'Employee details Spreadsheet document' link to download the spreadsheet.



*Fig 2.5 Download Spreadsheet*

**Step 7:** Once you download the spreadsheet, you can enter your employee data into the spreadsheet and **save it in a CSV format.**

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	EE1	EE2	EE3	EE4	EE5	EE6	EE7	EE8	EE9	EE10	EE11	EE12	EE13	EE14
2	Employer / Client / Branch Reference *	Employer / Client / Branch Name *	Employee Works Number / Payroll ID *	Title *	Surname *	First Forename *	Second Forename	Employee Address Line 1	Address Line 2	Address Line 3	Address Line 4	Post code	Country	Employee Telephone Number
3	Client1	Demo Client 1	WKS-001	Mr	Redford	Robert		777 Lucky St	London	NW11 9HY	United Kingdom	KH67UY	United Kingdom	0161 1234 5
4	Client2	Demo Client 2	ABC-001	Mrs	Gilroy	Andy		191 Blanford	Reigate	Surrey RH2	United Kingdom	MH43PL	United Kingdom	01895 123 4
5														
6														
7														
8														
9														
10														
11														
12														

**Fig**

**2.6 Employee Migration Spreadsheet**

**Please note:**

You can enter the Employer/Client/Branch reference number in the first column of the employee migration spreadsheet. This is a key to identify the client and enables you to upload multiple clients' employees' in a single spreadsheet with their unique client reference associated to each employee.

Follow the road map below to find out your Employer/Client/Branch reference number.

**Road Map:**

*Employer/Setup* → *Employer Details* → *Employer / Contractor Contact Details* → *Employer / Contractor Reference*

Employer / Contractor Details ? < Back Edit

View Employer / Contractor Details	
Employer / Contractor Reference	BA12345
Employer / Contractor Name	Demo Company Limited
<b>Business Address</b>	777 Lucky Street Network House Boston County BR5 6BP United Kingdom
<b>Registered Office Address</b>	
Employer / Contractor Tel. No.	020 8731 9981
Employer / Contractor Fax No.	020 8922 3402
Employer / Contractor E-Mail	Democo@democo.com
Employer / Contractor Website	www.democo.com
Employer/Contractor's PAYE Reference	067 / V30456
Accounts Office Reference	067PA00045678
Employer / Contractor UTR Type	SA UTR
Self Assessment Unique Taxpayer Reference	2234567890
Employer / Contractor CRN No.	44234567
Employer / Contractor VAT No.	GB227198351

< Back Edit

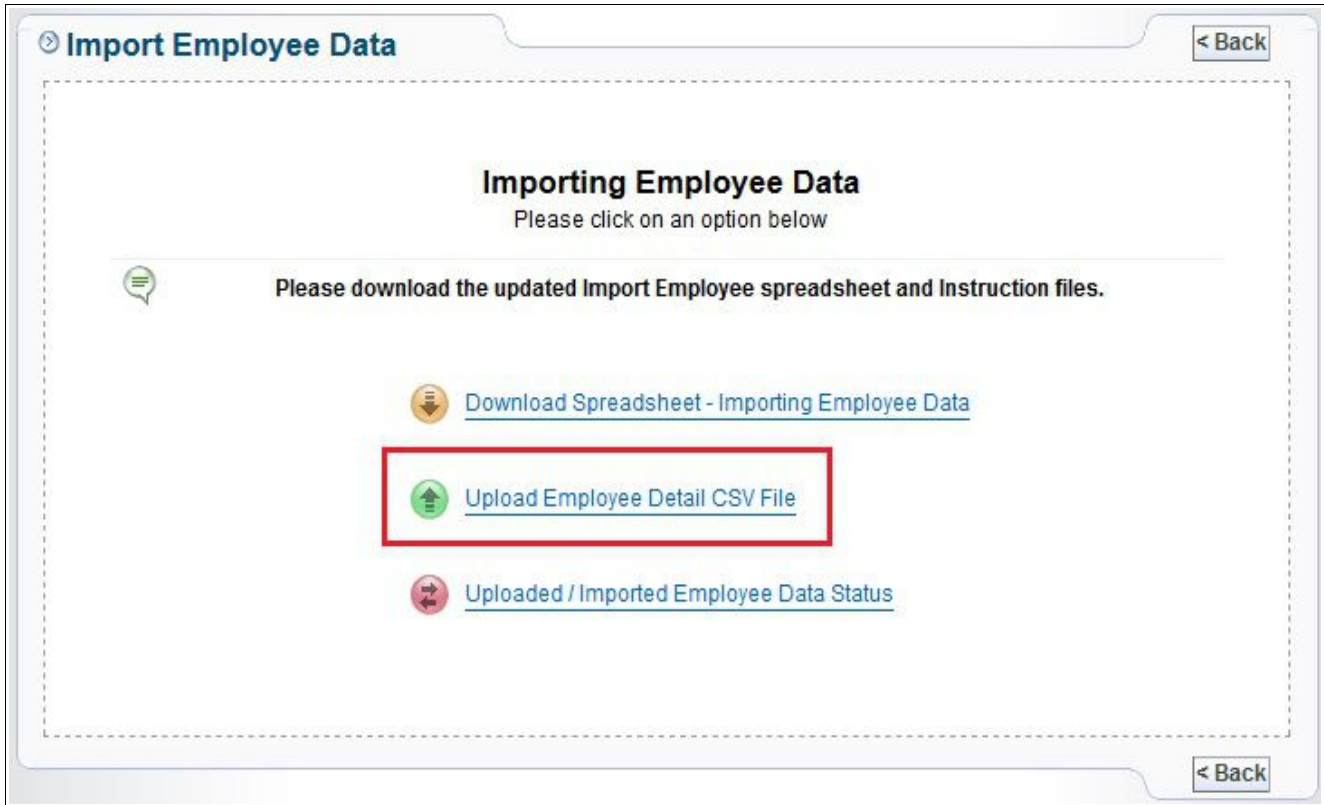
*Fig 2.7 Employer / Contractor Reference*

### 3 Uploading Employee Data CSV File

Once you finish entering the data in the employee migration spreadsheet, the next step is uploading the CSV file. To upload the CSV file you follow the same procedure for downloading the spreadsheet until the 'Import Employees' page.

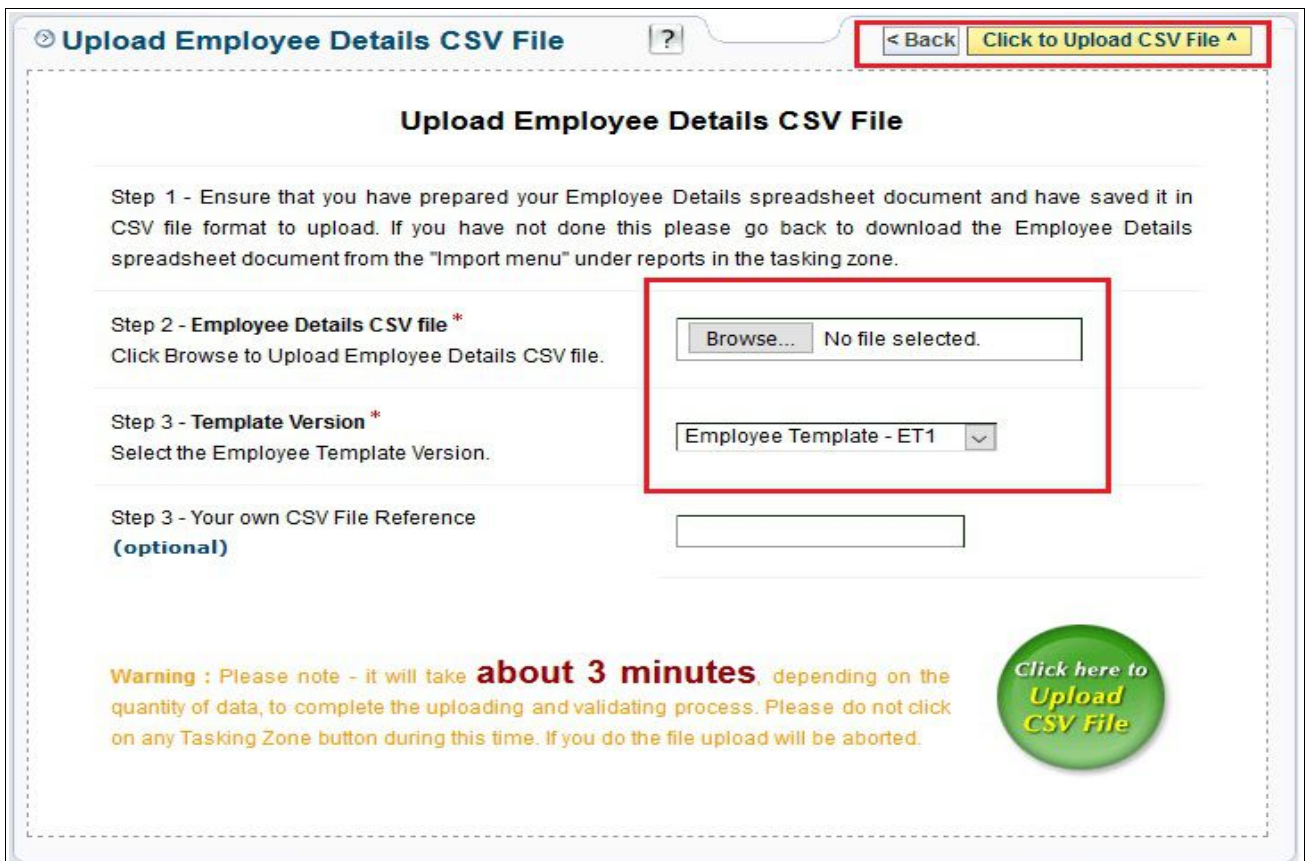
**Please note:** It is recommended that you review each and every entry you made in the spreadsheet to avoid mistakes.

**Step 1:** From the 'Import Employees' page click on '**Upload employee detail CSV File**'.



**Fig 3.1 Upload employee detail CSV File**

**Step 2:** Click on browse to upload the CSV file. Then select the appropriate template version and you may also enter a CSV file reference name.



**Fig 3.2 Upload CSV File**

**Step 3:** After uploading the file, you can view the 'Uploaded / Imported Employee Data Status' page. This page shows the Importing data status for all the migrated employees. If the status appear as **'Pending'**, click on the **'Select to import'** radio button for the respective employee and then click on **'Click to Import'**.

**Please Note:** If the data is incorrect or not according to the specifications the upload will fail and the status will be displayed as 'Upload Failed'. Click on the corresponding 'View' link to check the errors. You can then fix the errors listed and upload again.

Uploaded Date	User CSV File Ref.	Total Employees	Importer Name	Importing Data Status	Details	Select to Import
22/09/2018	004	46	Redford, Robert	Pending	<a href="#">View</a> <a href="#">Remove</a>	<input type="radio"/>
22/09/2018	001	86	Redford, Robert	Upload Failed	<a href="#">View</a> <a href="#">Remove</a>	
22/09/2018	002	71	Dean, James	Imported	<a href="#">View</a>	
21/09/2018	003	46	Dean, James	Pending	<a href="#">View</a> <a href="#">Remove</a>	<input type="radio"/>
22/09/2018	004	46	Douglas, Kirk	Imported	<a href="#">View</a>	
21/09/2018	003	46	Dean, James	Import Failed	<a href="#">View</a> <a href="#">Remove</a>	
21/09/2018	003	46	Dean, James	Imported	<a href="#">View</a>	
22/09/2018	004	46	Douglas, Kirk	Imported	<a href="#">View</a>	
21/09/2018	003	46	Dean, James	Imported	<a href="#">View</a>	
21/09/2018	003	46	Dean, James	Imported	<a href="#">View</a>	

**Fig 3.3 Employee Data Status**

**Step 4:** Enter your Sign In password to confirm importing employee data. Ensure that the employee details you are importing are correct.

**Confirm Importing Employee Data**

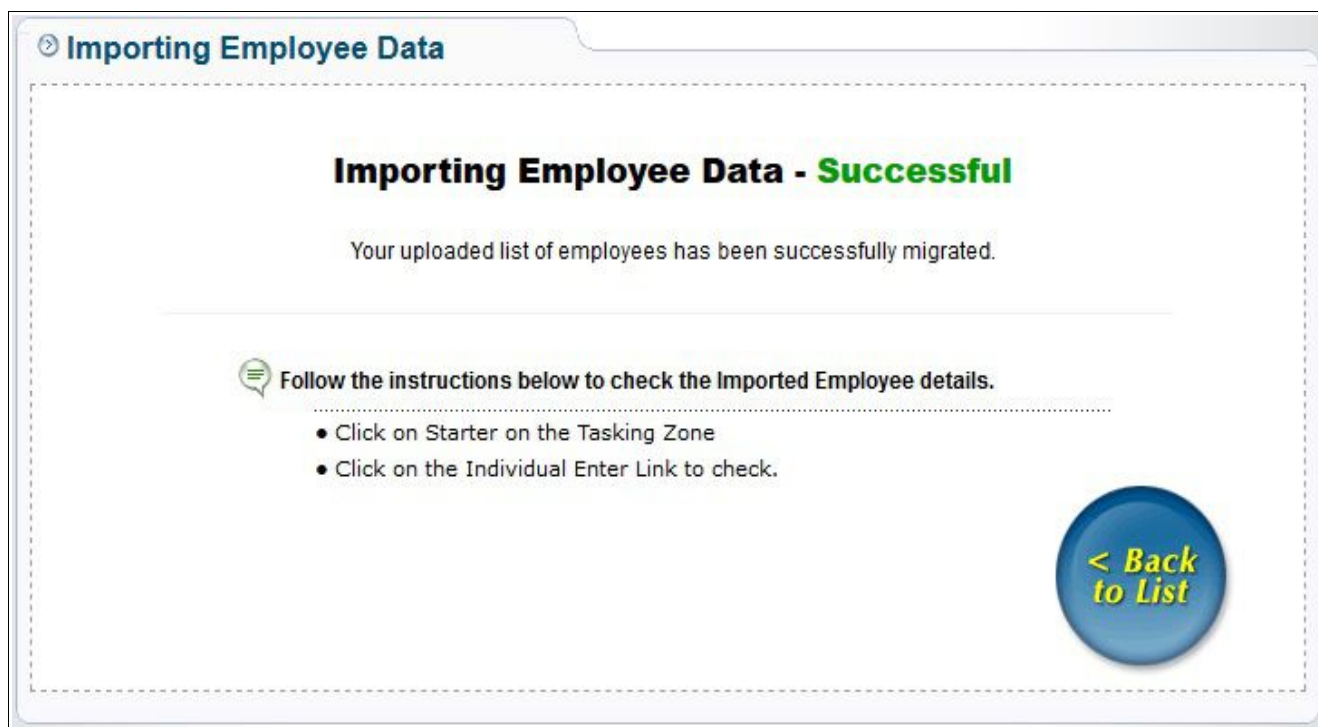
**NOTE:** Before you proceed, please ensure that the Employee Details that you are importing is correct. To confirm enter your password and click on the Confirm button to proceed

Enter User Sign In Password \*

[Click here to Import](#)

**Fig 3.4 Confirm Importing**

**Step 5:** After successful importing of employee data, the page(Fig 3.5) shown below will be displayed.



**Fig 3.5 Successful Importing**

## **Employee Login Demo**

This demo shows employee Account activation and log in demo. Employee can Log In to his / her account and view / Edit his / her personal details, Emergency contact details and print P11D summary. Employees can Setup the Mobile App Password too.

**Please click on the below link to view the demo:**

**[Click here to view Demo](#)**

## To Know More:

(For more information about our products and services, please contact our Support Team.)

**Support Email:**

[sales@payroo.com](mailto:sales@payroo.com)

**Tel: 020 8450 7314**