

Elevate your client relationships with 6 vital payroll tools

Bright

1

Bright

Welcome to today's webinar

2

Bright
Simply brilliant software

Accountancy, tax, payroll and practice management software

AM
ACCOUNTANCY MANAGER

brightpay

Surf

btc
SOFTWARE

3

Presenters

Elaine Carroll
Content Marketing Specialist

Ross Graham
Content Marketing Executive


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Agenda


1. How to automate payroll processes
2. Providing an online payroll portal for clients
3. A payroll app for your clients' employees
4. How you can streamline client communications
5. Tips on offering new services to clients
6. A tour of BrightPay and BrightPay Connect
7. Questions & Answers

6

Why are some accountants not profiting from payroll?




Mistake one:
The right technology is not being used



Mistake two:
Accountants are undervaluing their payroll services

7

How to automate payroll processes




Batch Payroll Processing

8







Batch processing in BrightPay

- 1 Batch finalise payslips
- 2 Batch check for coding notices
- 3 Batch send HMRC submissions



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How to automate payroll processes


-  Batch Payroll Processing 
-  Accounting Software Integration 
-  


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BrightPay includes integration with...


































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How to automate payroll processes






Batch Payroll Processing




Accounting Software Integration




Auto Enrolment Functionality

14

Auto enrolment





- Enrolling eligible employees
- Creating enrolment letters to send to employees
- Re-enrolling employees after three years
- Monitoring changes to employee eligibility




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On-screen alerts







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BrightPay includes integration with...





NATIONAL EMPLOYMENT SAVING TRUST









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How to automate payroll processes




Batch Payroll Processing




Self-Service Portals




Accounting Software Integration





Auto Enrolment Functionality

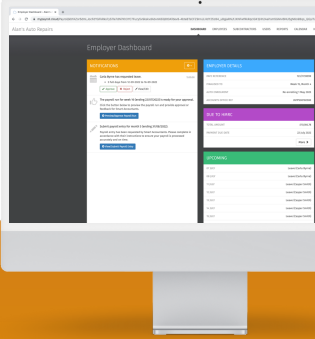


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Client self-service portals

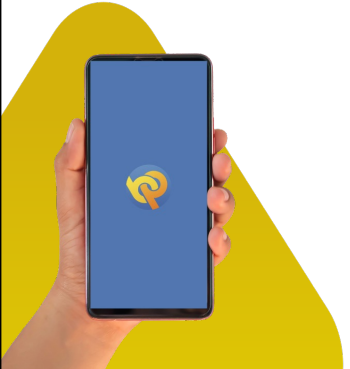
- Clients can access what they need with no bureau intervention needed
- Run payroll reports, view payslips, view amounts due to HMRC
- Automatically available to the client through their online portal
- No need to email payslips and reports to clients each pay period



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Employee self-service portals




- Remote access to their own payslip library anywhere anytime
- Eliminates time spent printing or emailing payslips
- Payslips automatically available without any action required
- Massive time savings and increased productivity for payroll processors


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How to automate payroll processes




Batch Payroll Processing




Self-Service Portals




Accounting Software Integration



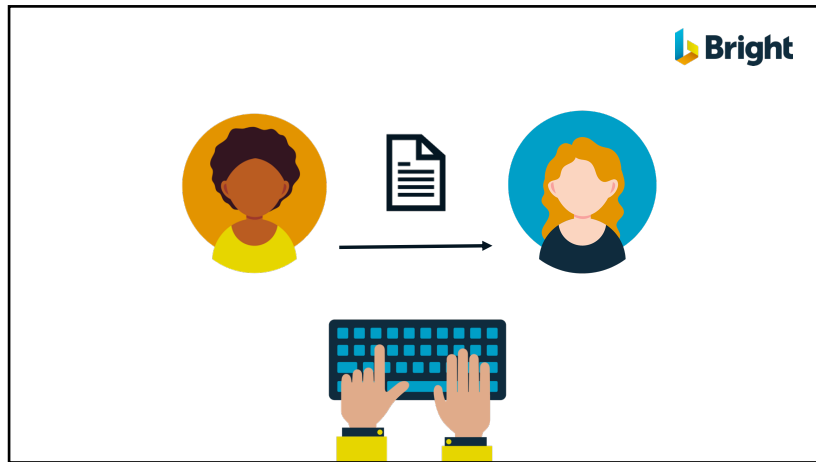
Increased Client Responsibility



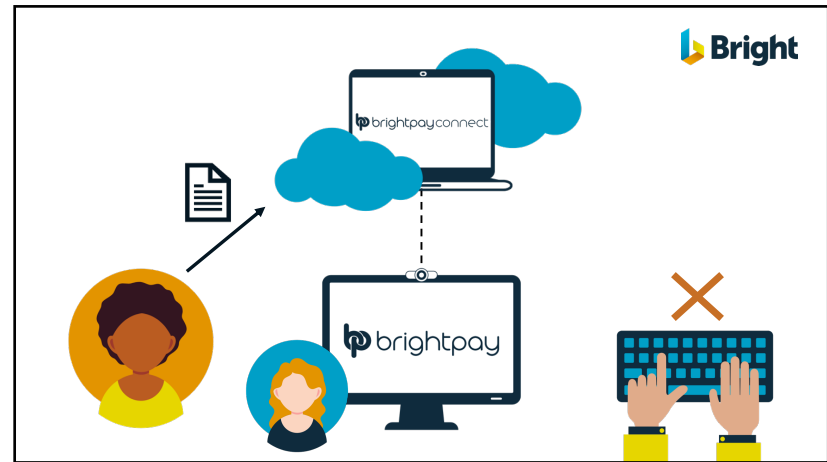
Auto Enrolment Functionality



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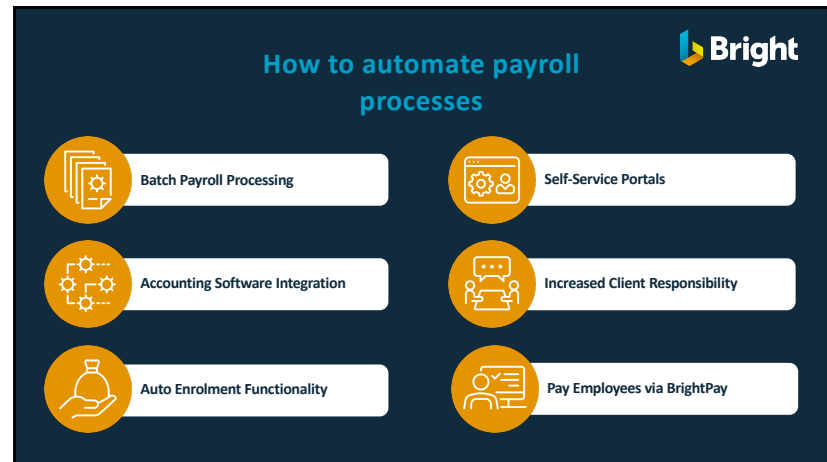
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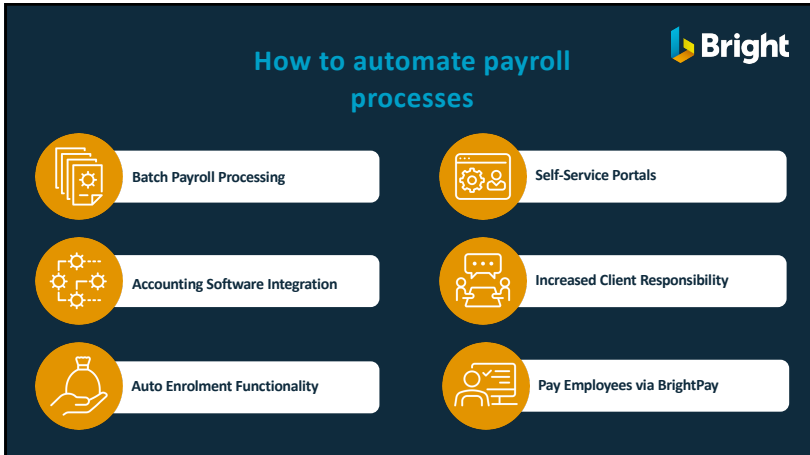
BrightPay's payment API



- Pay employees through BrightPay
- Powered by Modulr
- Eliminate bank files
- Secure Modulr portal for clients
- Clients easily approve payments

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How to automate payroll processes



- Batch Payroll Processing
- Self-Service Portals
- Accounting Software Integration
- Increased Client Responsibility
- Auto Enrolment Functionality
- Pay Employees via BrightPay

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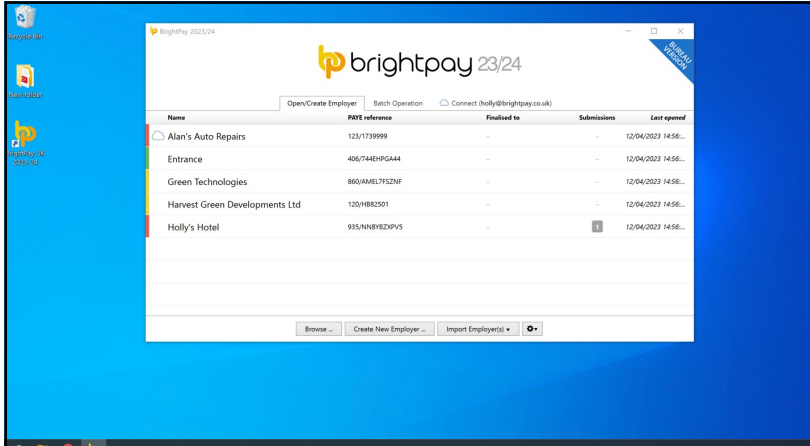
Upcoming webinar:

Game-changing ways to beat these 5 payroll challenges

Wednesday, 14th June, 11:00 am

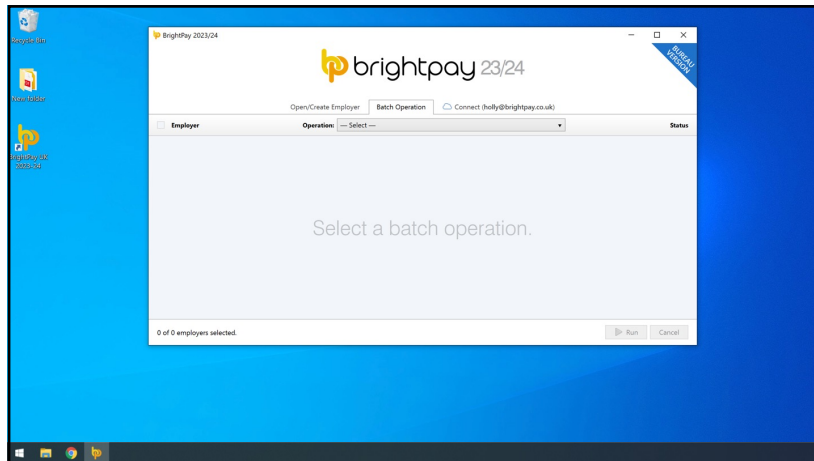


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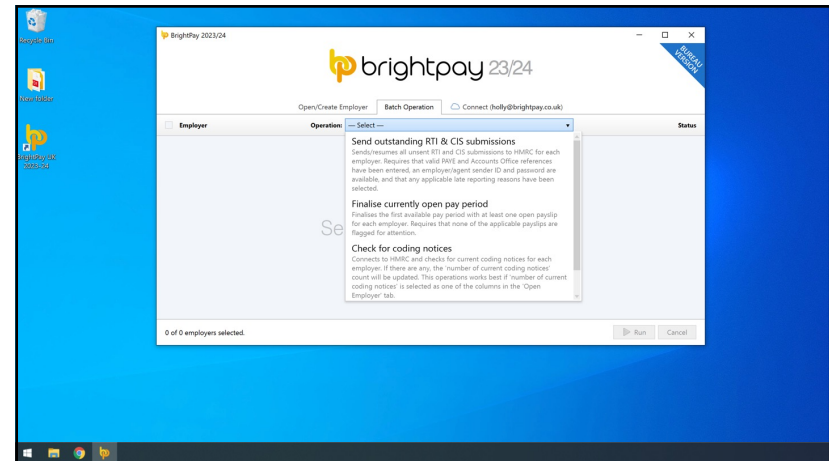


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Alan's Auto Repairs	1231739999	-	-	12/04/2023 14:56...
Entrance	406744HRG444	-	-	12/04/2023 14:56...
Green Technologies	860/AMEL7FS2NF	-	-	12/04/2023 14:56...
Harvest Green Developments Ltd	1201H882501	-	-	12/04/2023 14:56...
Holly's Hotel	935/NNBY8Z0PVS	-	1	12/04/2023 14:56...

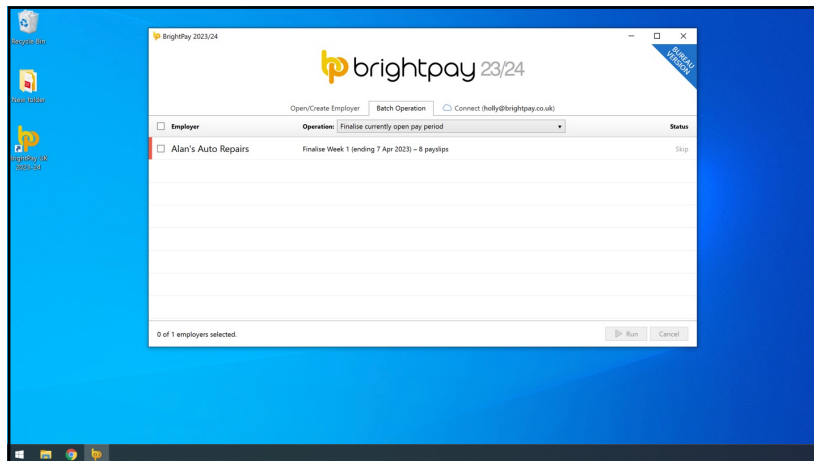
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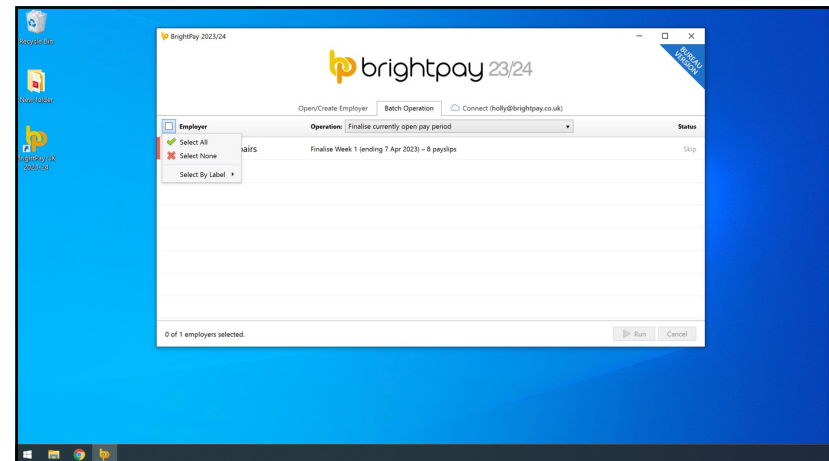
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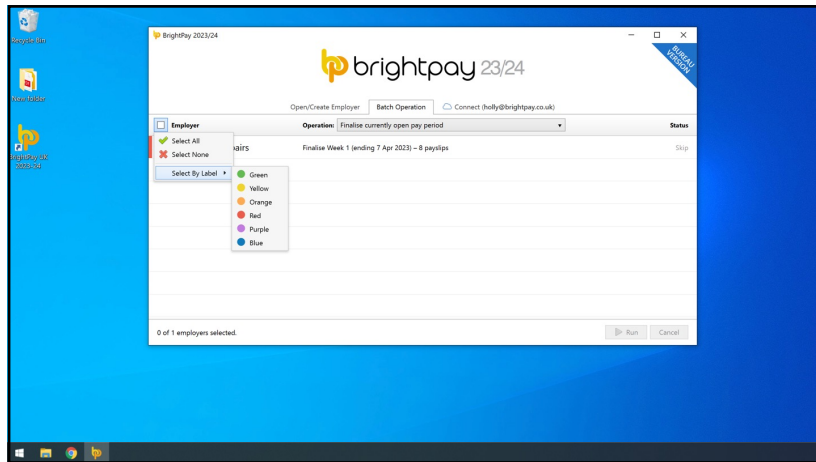
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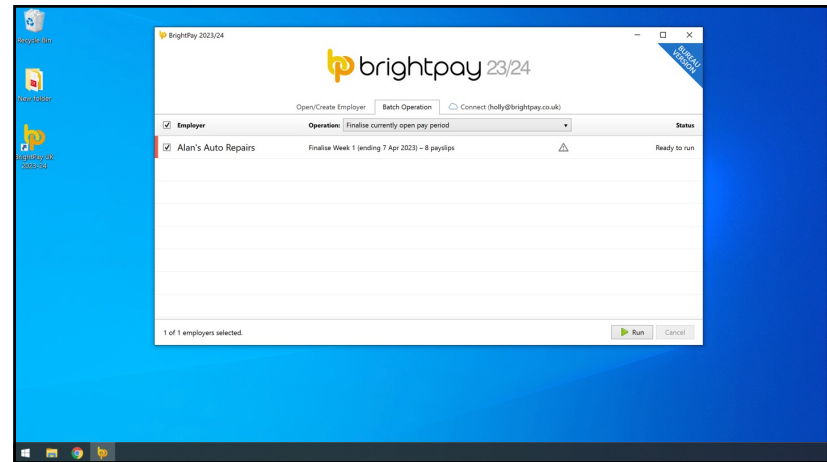
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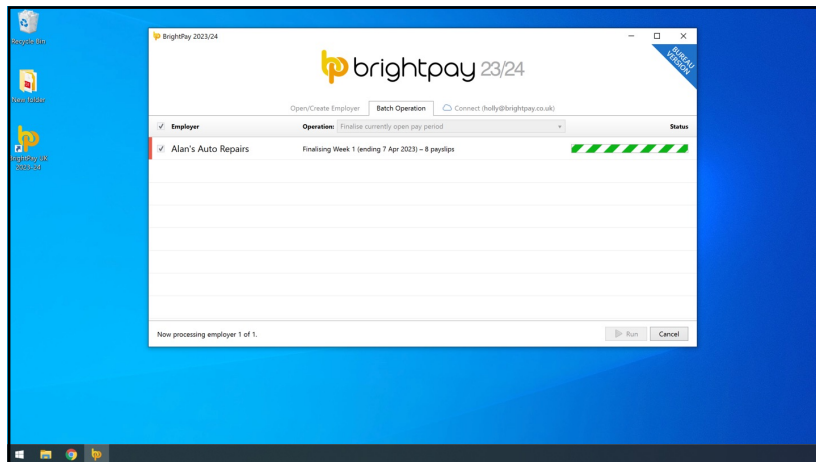
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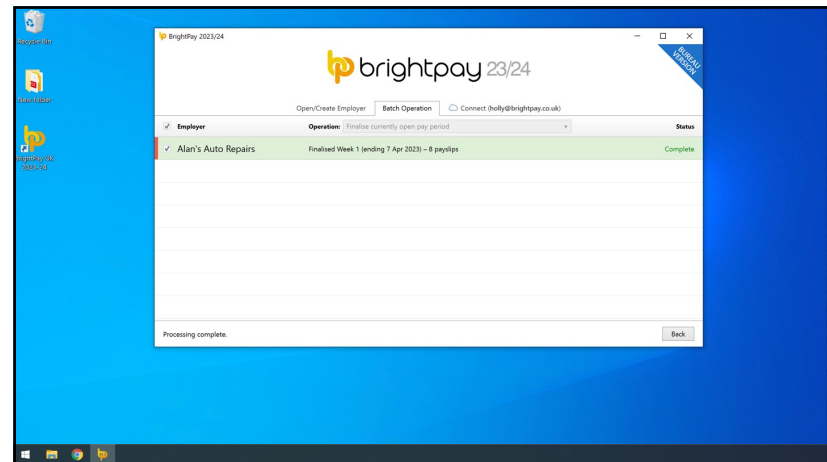
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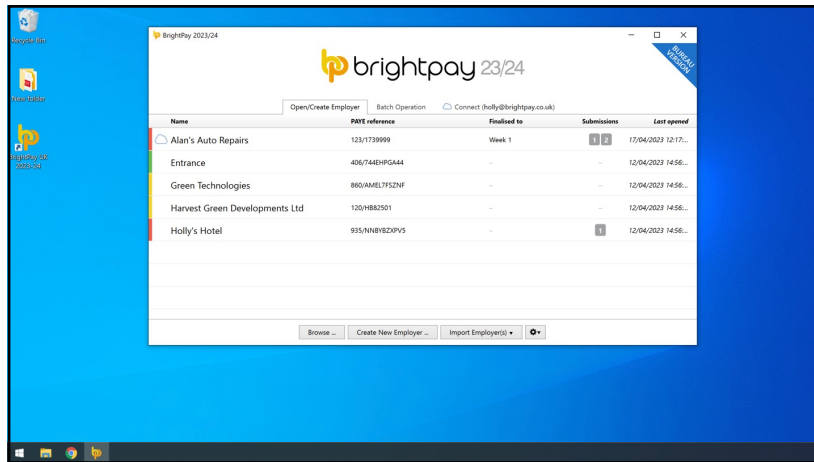
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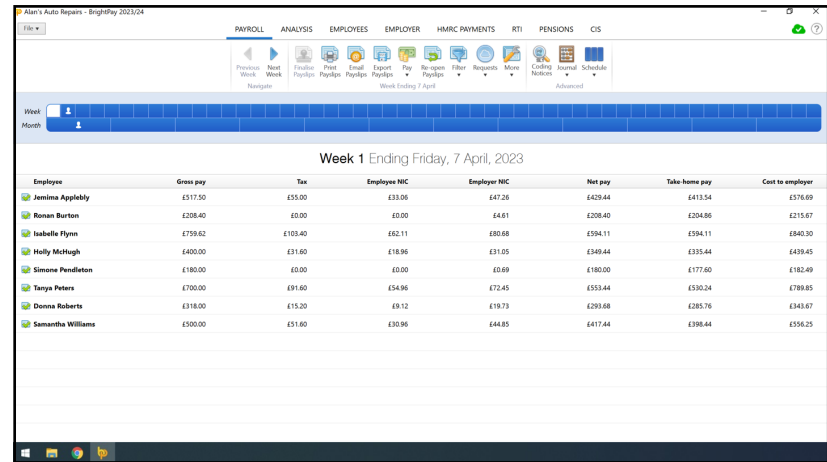
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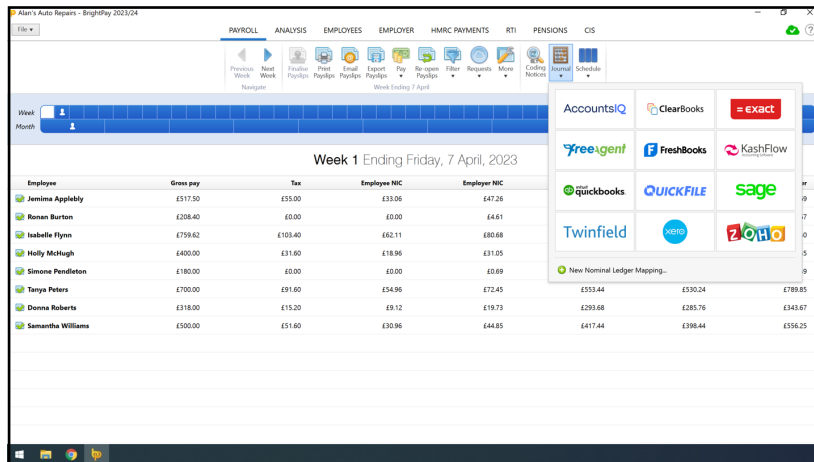
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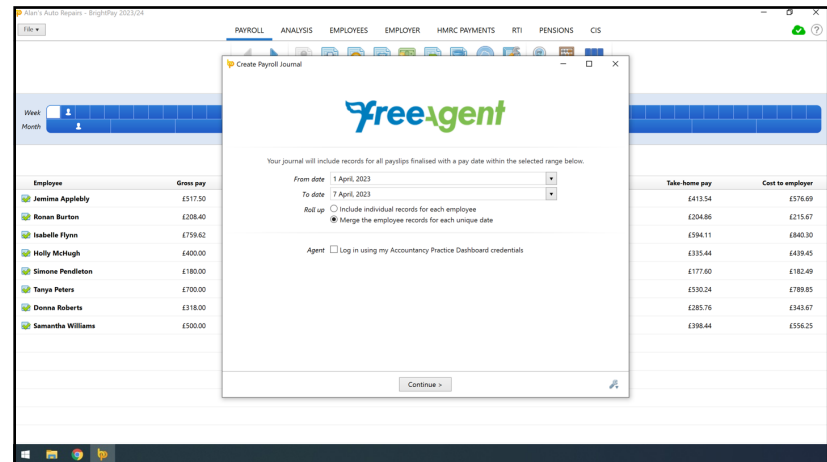
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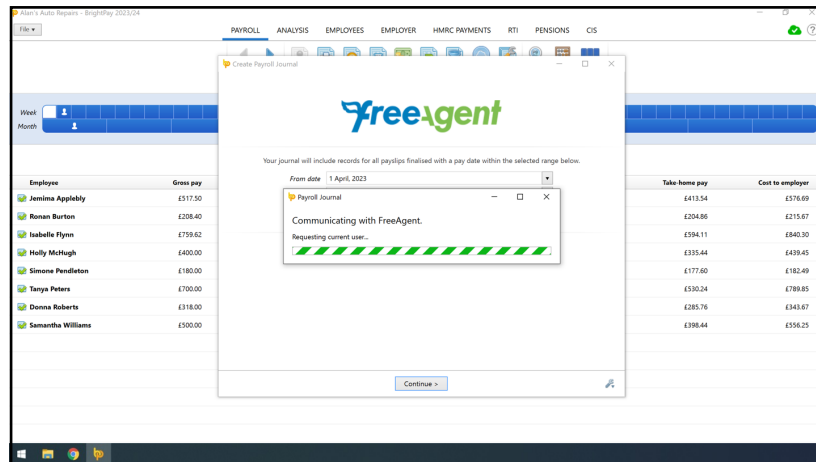
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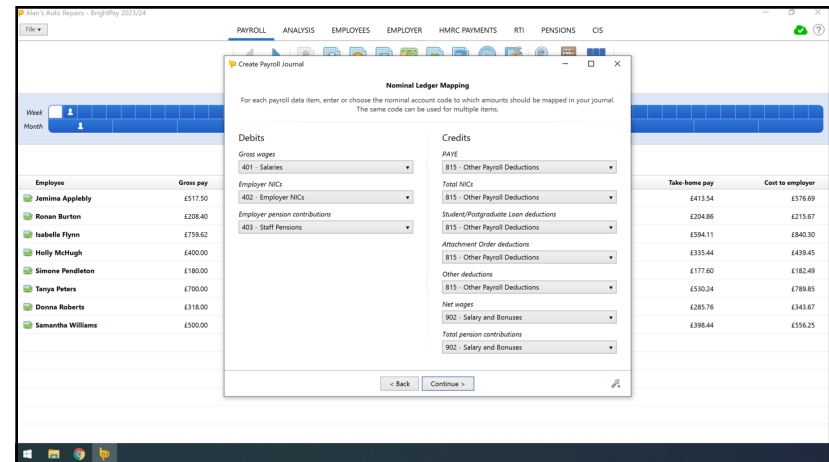
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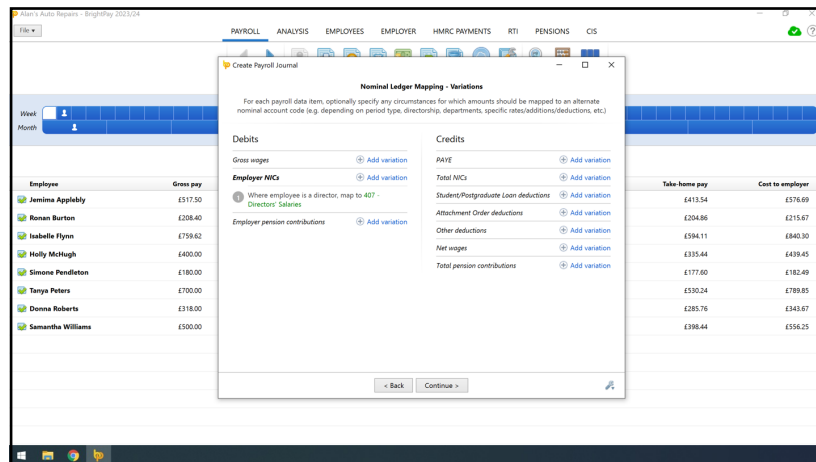
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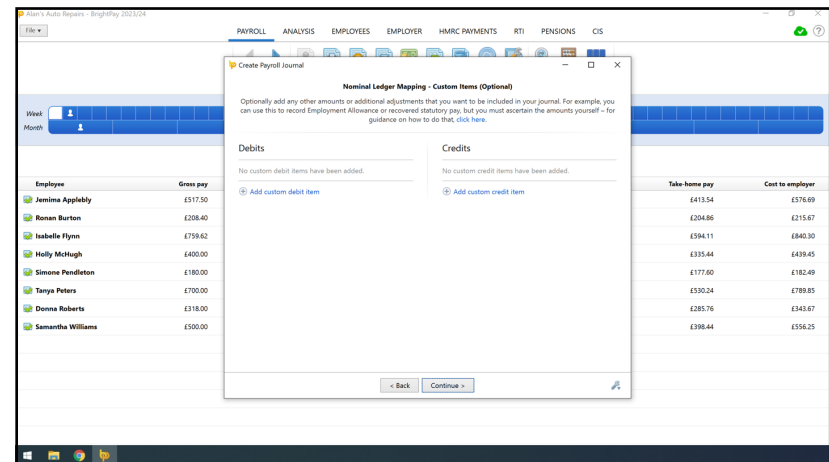
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Your journal is displayed below.
The journal includes paylips finalised with a pay date between 01/04/2023 and 07/04/2023 inclusive.

Date	Reference	Nominal account	Debit	Credit
07/04/2023	8 employees	401 - Salaries	£3,583.52	-
07/04/2023	8 employees	815 - Other Payroll Deductions	-	£858.89
07/04/2023	8 employees	902 - Salary and Bonuses	-	£3,085.48
07/04/2023	8 employees	402 - Employer NICs	£301.32	-
07/04/2023	7 employees	403 - Staff Pensions	£59.53	-

Employee	Gross pay	Take-home pay	Cost to employer
Jemima Appleby	£517.50	£413.54	£576.69
Ronan Burton	£208.40	£204.86	£215.67
Isabelle Flynn	£759.62	£594.11	£840.30
Holly McHugh	£400.00	£335.44	£439.45
Simone Pendleton	£180.00	£177.60	£182.49
Tanya Peters	£700.00	£530.24	£789.85
Donna Roberts	£318.00	£285.76	£343.67
Samantha Williams	£500.00	£398.44	£556.25
Total		£3,944.37	£3,944.37

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Alan's Auto Repairs - BrightPay 2023/24

PAYROLL ANALYSIS EMPLOYEES EMPLOYER HMRC PAYMENTS RTI PENSIONS CIS

File

Week 1 Month 1

Your journal is displayed below.
The journal includes payrolls finalised with a pay date between 01/04/2023 and 07/04/2023 inclusive.

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07/04/2023	8 employees	401 - Salaries	£3,883.52	-
07/04/2023	8 employees	815 - Other Payroll Deductions	-	£858.89
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Employee Gross pay Take-home pay Cost to employer

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Total		£3,944.37	£3,944.37

Do you want to save changes to the nominal ledger mapping 'FreeAgent'?

Yes No

< Back Print... Sent to FreeAgent

50

Alan's Auto Repairs - BrightPay 2023/24

PAYROLL ANALYSIS EMPLOYEES EMPLOYER HMRC PAYMENTS RTI PENSIONS CIS

File

Week 1 Month 1

Week 1 Ending Friday, 7 April, 2023

Employee	Gross pay	Tax	Employee NIC	Employer NIC	Net pay	Take-home pay	Cost to employer
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Holly McHugh	£400.00	£31.60	£18.96	£31.05	£349.44	£335.44	£439.45
Simone Pendleton	£180.00	£0.00	£0.00	£0.69	£180.00	£177.60	£182.49
Tanya Peters	£700.00	£91.60	£54.96	£72.45	£553.44	£530.24	£789.85
Donna Roberts	£318.00	£15.20	£9.12	£19.73	£293.68	£285.76	£343.67
Samantha Williams	£500.00	£51.60	£30.96	£44.85	£417.44	£398.44	£556.25

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Alan's Auto Repairs - BrightPay 2023/24

PAYROLL ANALYSIS EMPLOYEES EMPLOYER HMRC PAYMENTS RTI PENSIONS CIS

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Alan's Auto Repairs - BrightPay 2023/24

PAYROLL ANALYSIS EMPLOYEES EMPLOYER HMRC PAYMENTS RTI PENSIONS CIS

File

Week 1 Month 1

Pay Employees (Week Ending 7 April)

Modulr

Modulr provides a simple, fast and efficient way to pay your employees.

To send a payment request from BrightPay to Modulr, you'll require an active Modulr account. If you are a Bureau customer, you'll also need the necessary permissions to send a payment request on behalf of your client. For more information about Modulr or details on how to sign up, click [here](#).

AUTHY

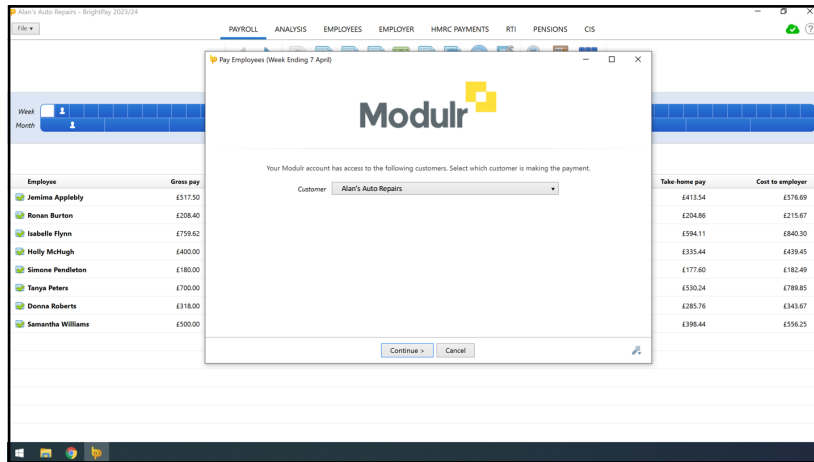
Note that the Authy app will be required to complete this process with Modulr.

When you're ready, click Continue to get started.

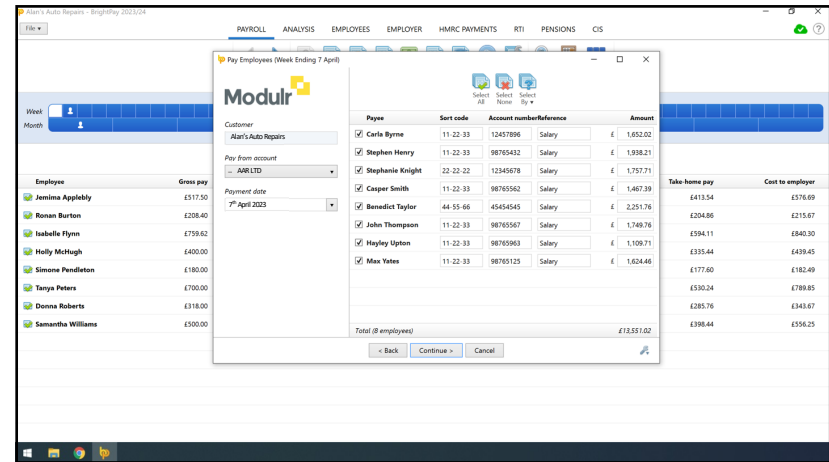
Continue > Cancel

Employee	Gross pay	Take-home pay	Cost to employer
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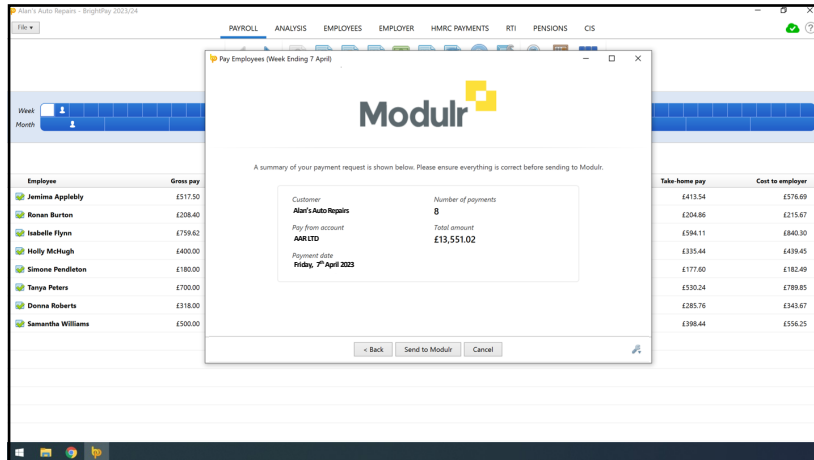
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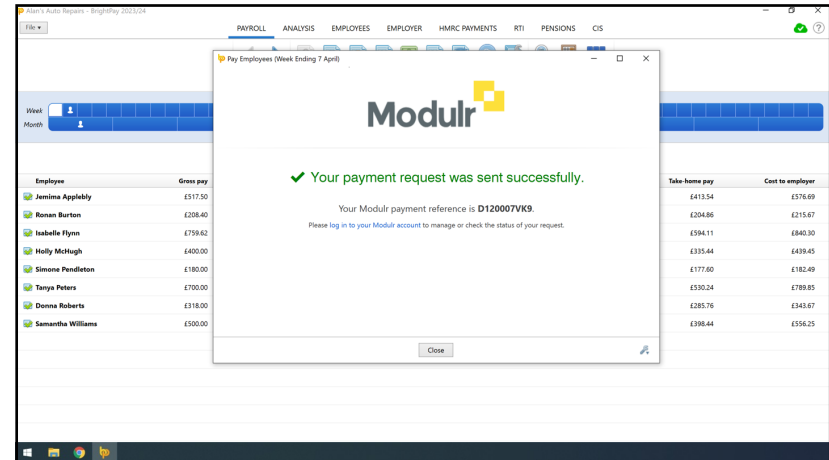
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Alan's Auto Repairs - BrightPay 2023/24

Week Ending 7 April, 2023

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Alan's Auto Repairs - BrightPay 2023/24

Month Ending 5 May, 2023

Tax	Amount	NICs	Amount	Year to Date	Amount
Gross Tax	£348.40	Employee NICs	£209.17	Due in previous months	£0.00
Received from HMRC to refund tax	£ 0.00	Employer NICs	£301.32	Paid in previous months	£0.00
Gross CIS deductions	£0.00	SMP Recovered + NIC Compensation	£0.00	Shortfall	£0.00
CIS deductions suffered	£ 0.00	SPP Recovered + NIC Compensation	£0.00	Carry over shortfall into this month	<input checked="" type="radio"/> Yes <input type="radio"/> No
Gross Student Loan deductions	£0.00	SAP Recovered + NIC Compensation	£0.00	Adjustment	£ 0.00
Gross Postgraduate Loan deductions	£0.00	SHP Recovered + NIC Compensation	£0.00	Net adjustment	£0.00
Net Income Tax	£348.40	SPP Recovered + NIC Compensation	£0.00		
		Received from HMRC to pay Statutory Pay	£ 0.00		
		Employment Allowance claim	Enable...		
		Apprenticeship Levy	Enable...		
		Net NICs	£510.49		

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Alan's Auto Repairs - BrightPay 2023/24

Month Ending 5 May, 2023

Tax	Amount	NICs	Amount	Year to Date	Amount
Gross Tax	£348.40	Employee NICs	£209.17	Due in previous months	£0.00
Received from HMRC to refund tax	£ 0.00	Employer NICs	£301.32	Paid in previous months	£0.00
Gross CIS deductions	£0.00	SMP Recovered + NIC Compensation	£0.00	Shortfall	£0.00
CIS deductions suffered	£ 0.00	SPP Recovered + NIC Compensation	£0.00	Carry over shortfall into this month	<input checked="" type="radio"/> Yes <input type="radio"/> No
Gross Student Loan deductions	£0.00	SAP Recovered + NIC Compensation	£0.00	Adjustment	£ 0.00
Gross Postgraduate Loan deductions	£0.00	SHP Recovered + NIC Compensation	£0.00	Net adjustment	£0.00
Net Income Tax	£348.40	SPP Recovered + NIC Compensation	£0.00		
		Received from HMRC to pay Statutory Pay	£ 0.00		
		Employment Allowance claim	Enable...		
		Apprenticeship Levy	Enable...		
		Net NICs	£510.49		

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Alan's Auto Repairs - BrightPay 2023/24

Week 1 Ending Friday, 7 April, 2023

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Alan's Auto Repairs - Brightly 2023/24

Week Ending Friday, 7 April, 2023

Employee	Gross pay	Tax	Employee NIC	Employer NIC	Net pay
Jemima Appleby	£517.50	£55.00	£33.06	£47.26	£429.44
Ronan Burton	£208.40	£0.00	£0.00	£4.61	£208.40
Isabelle Flynn	£759.62	£103.40	£62.11	£80.68	£594.11
Holly McHugh	£400.00	£31.60	£18.96	£31.05	£349.44
Simone Penfolden	£180.00	£0.00	£0.00	£0.69	£177.60
Taryn Peters	£700.00	£91.60	£54.96	£72.45	£553.44
Donna Roberts	£318.00	£15.20	£9.12	£19.73	£293.68
Samantha Williams	£500.00	£51.60	£30.96	£44.85	£417.44

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Employer Dashboard

NOTIFICATIONS

- Carla Byrne has requested leave. 5 full days from 19-10-2022 to 23-10-2022. Approve / Reject / View List
- The payroll run for month 9 (ending 31/12/2022) is ready for your approval. Click the button below to preview the payroll run and provide approval or feedback for Smart Accounts.
- Submit payroll entry for week 33 (ending 10/11/2022). Payroll entry has been requested by Smart Accounts. Please complete in accordance with their instructions to ensure your payroll is processed accurately and on time.

EMPLOYER DETAILS

PAVE REFERENCE: 1231729999
 FINALISED TO: Week 22, Month 8
 AUTO ENROLMENT: Re-enrolling 1 May 2023
 ACCOUNTS OFFICE REF: 20P500182000

DUE TO HMRC

TOTAL AMOUNT: £28,433.7
 PAYMENT DUE DATE: 22 September 2022

UPCOMING

18 OCTOBER: Leave (Carla Byrne)

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16 employees

Download paylips | Send invitation emails

Search by employee name

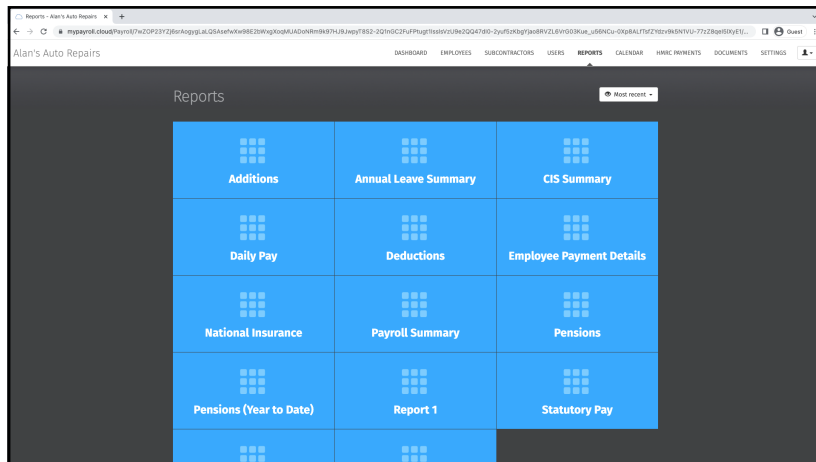
Employee	WORKS NUMBER	NINO	LAST ACTIVE
Benedict Taylor	857	KW 77 11 87 C	03/06/2019
Carla Byrne	104	SC 91 57 75 B	20/09/04
Casper Smith	845	ZI 59 54 27 C	06/06/2002
Donna Roberts	832	LH 15 09 20 A	-
Hayley Upton	881	YT 86 43 48 B	10/12/2019
Isabelle Flynn	62805	HH 39 98 07 A	-

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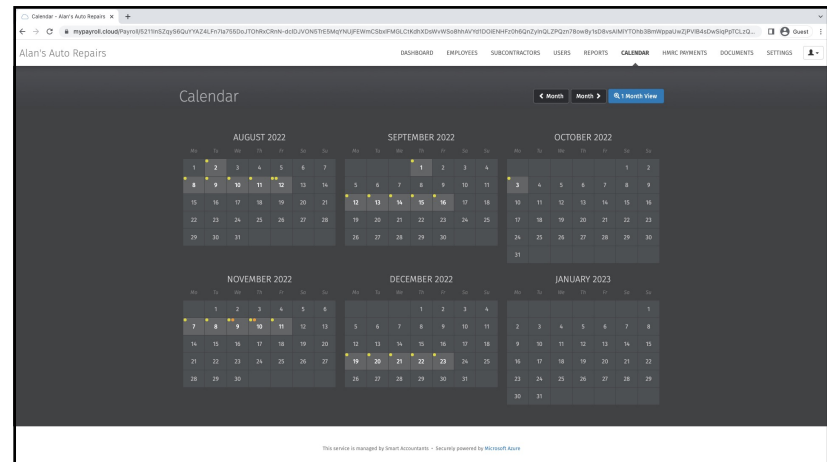
4 subcontractors

Subcontractor	CONTACT	TYPE	WORKS NUMBER	TAX INCREMENT STATUS
Blue Hide-and-Seek	Shelby Cannon	Company	380	Unknown
Brandywine	Dorian Dorsey	Sole Trader	837	Unknown
Eleven	Hiatt Kirk	Company	154	Unknown
Halo Media Factory	Opem Bryan	Sole Trader	762	Unknown

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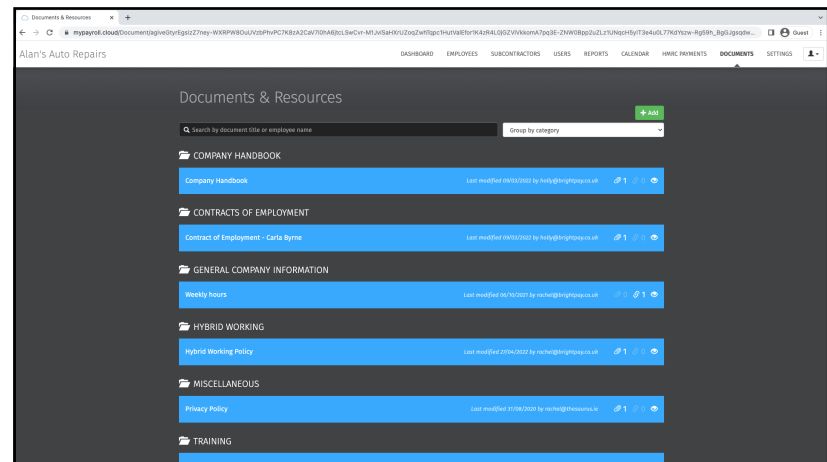
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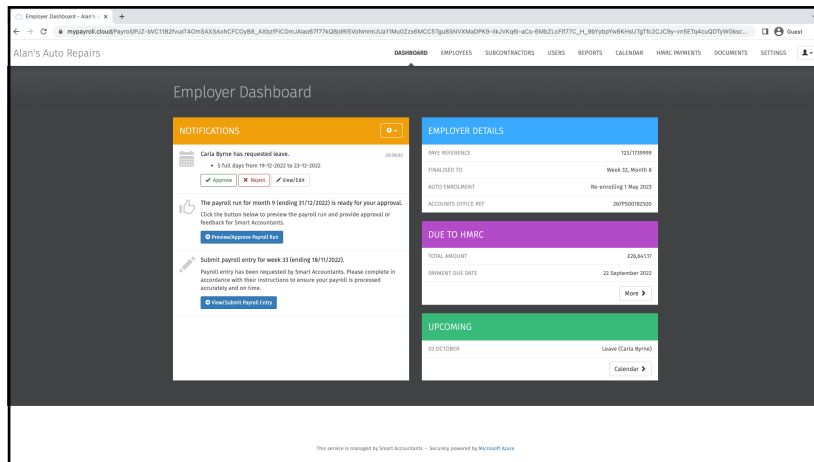
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PERIOD ENDING	TAX	NIC	AMOUNT PAID	AMOUNT DUE
5 May 2022	£2,274.66	£6,996.43	£10,600.38	£3,713.51
5 June 2022	£3,325.97	£8,026.32	£9,658.92	£2,930.79
5 July 2022	£2,453.27	£6,906.73	£0.00	£10,366.76
5 August 2022	£3,370.20	£5,343.66	£0.00	£18,940.64
5 September 2022	£3,026.80	£4,773.73	£0.00	£26,641.57
5 October 2022	£3,027.00	£4,773.73	£0.00	£24,442.50
5 November 2022	£3,370.00	£5,272.92	£0.00	£43,593.82
5 December 2022	£2,096.00	£3,378.56	£0.00	£48,418.38
5 January 2023	£0.00	£0.00	£0.00	£48,418.38
5 February 2023	£0.00	£0.00	£0.00	£48,418.38
5 March 2023	£0.00	£0.00	£0.00	£48,418.38

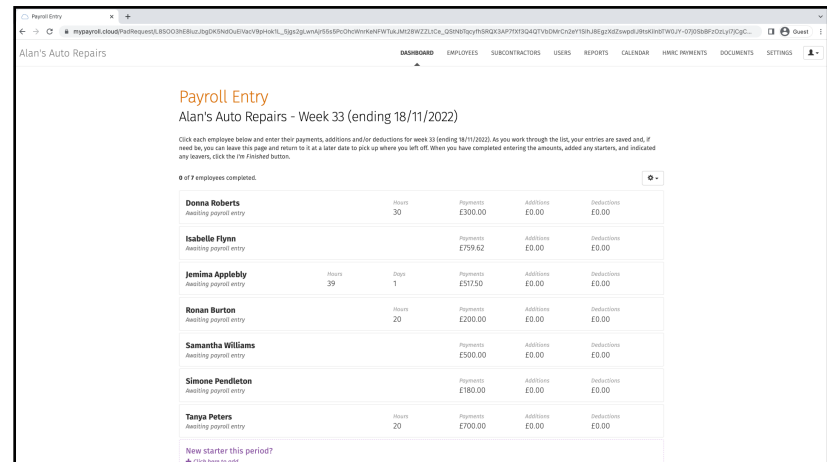
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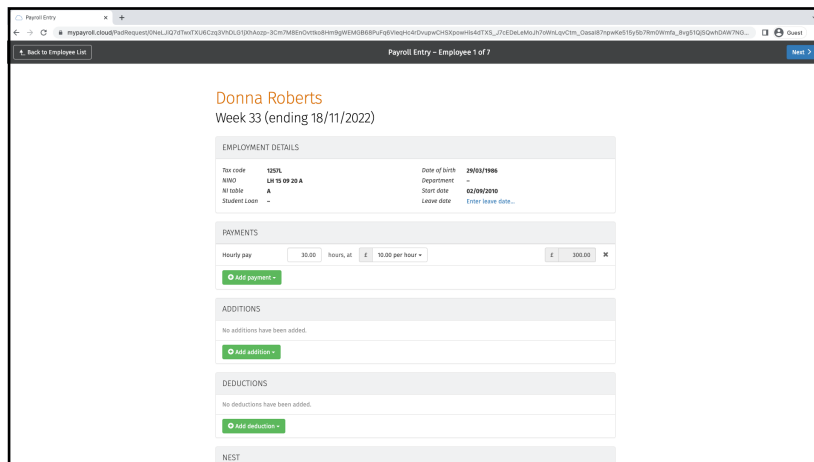
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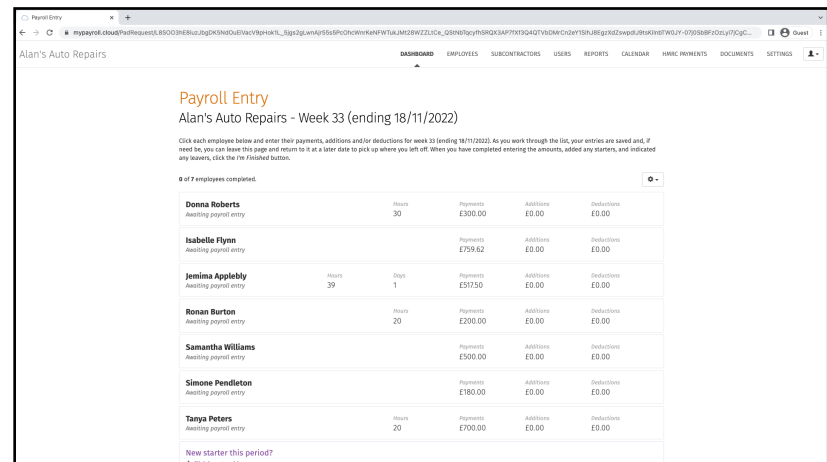
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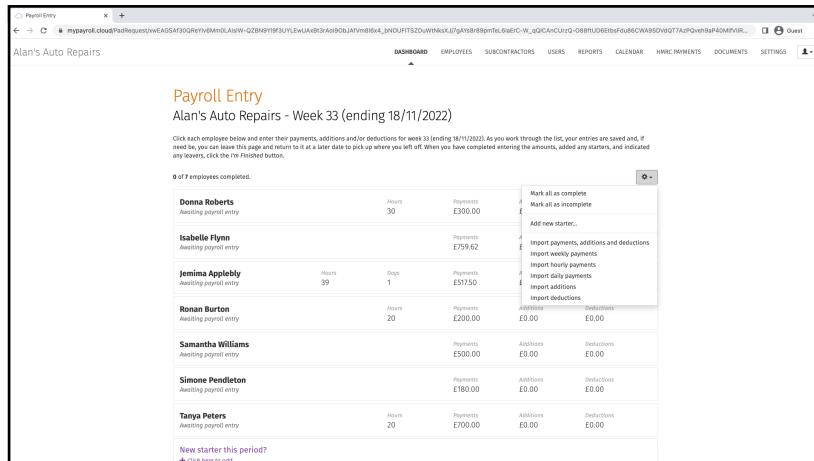
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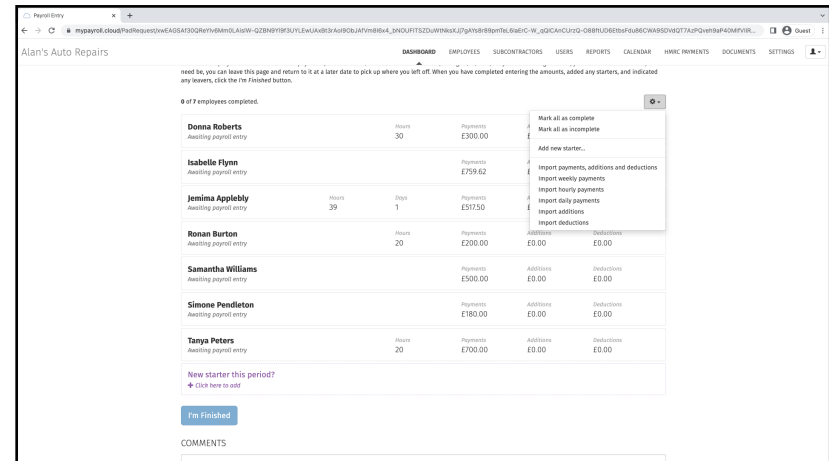
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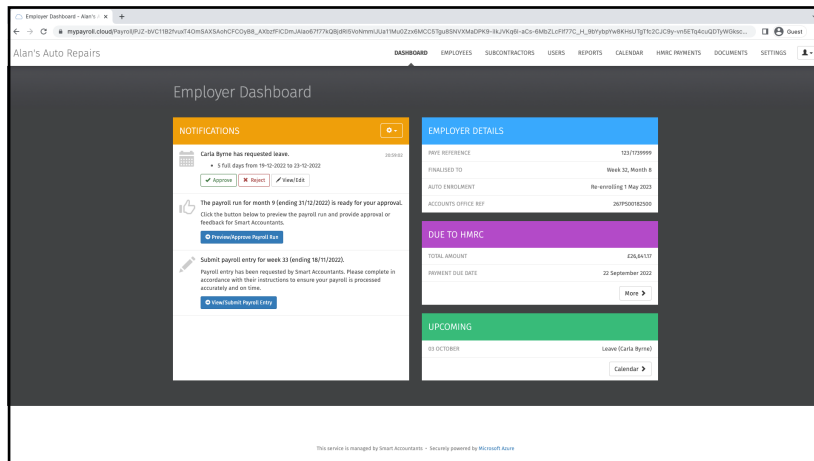
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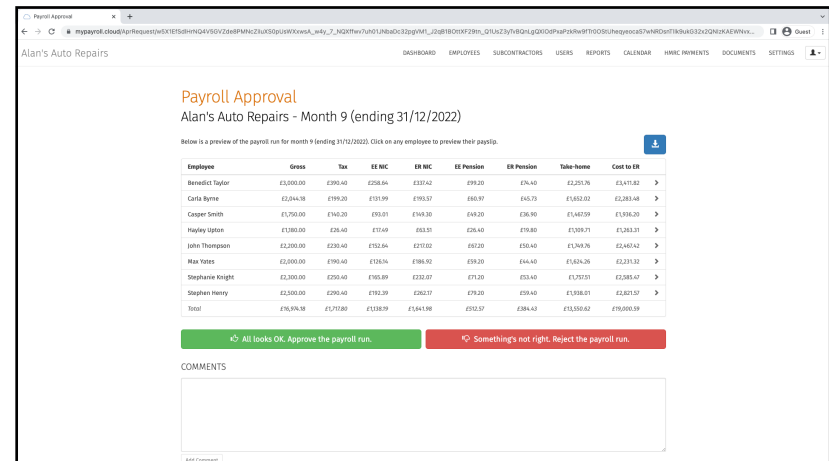
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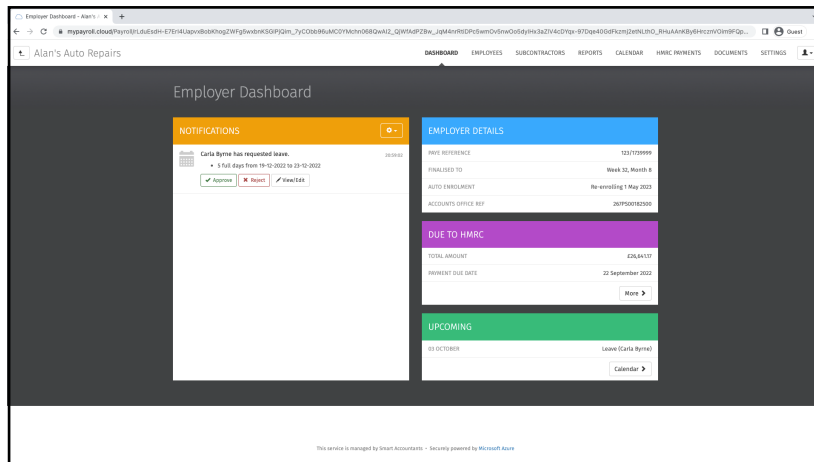
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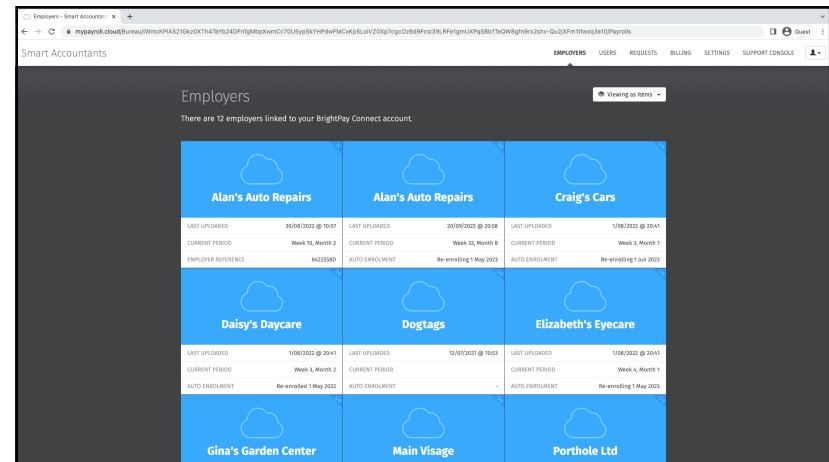
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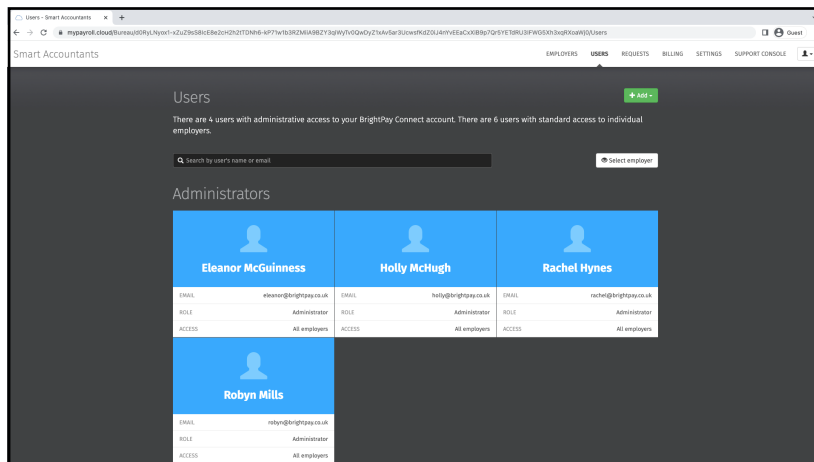
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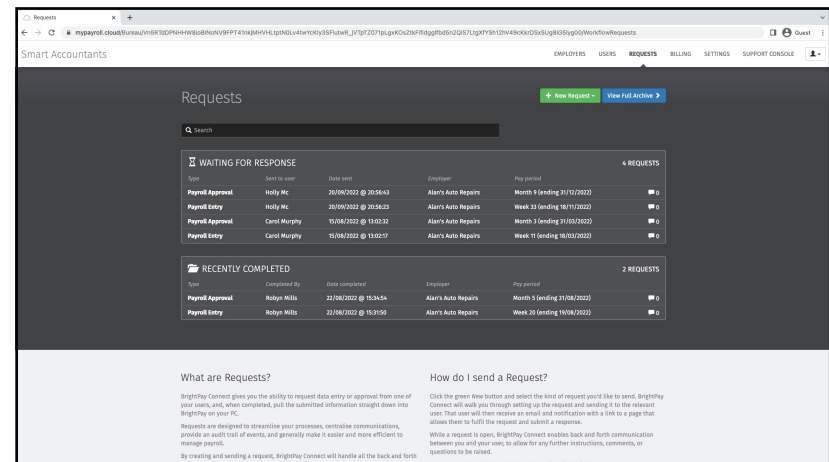
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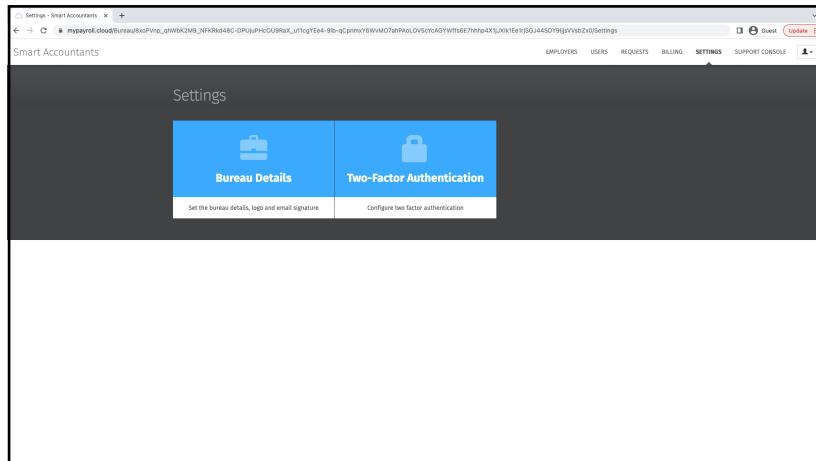
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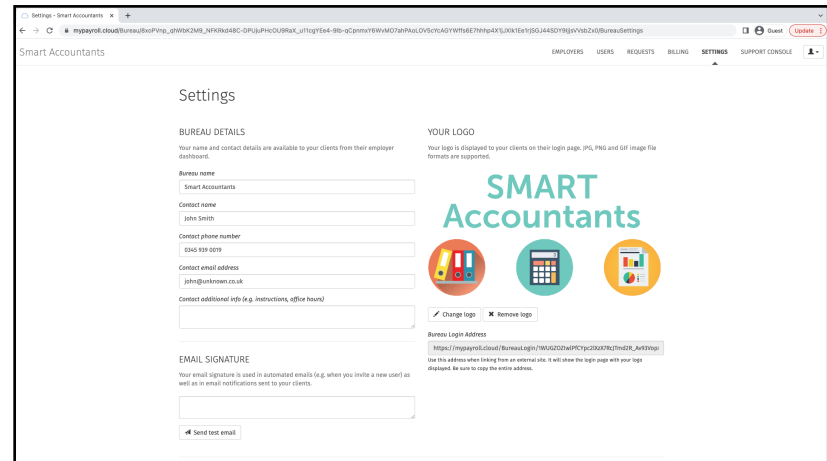
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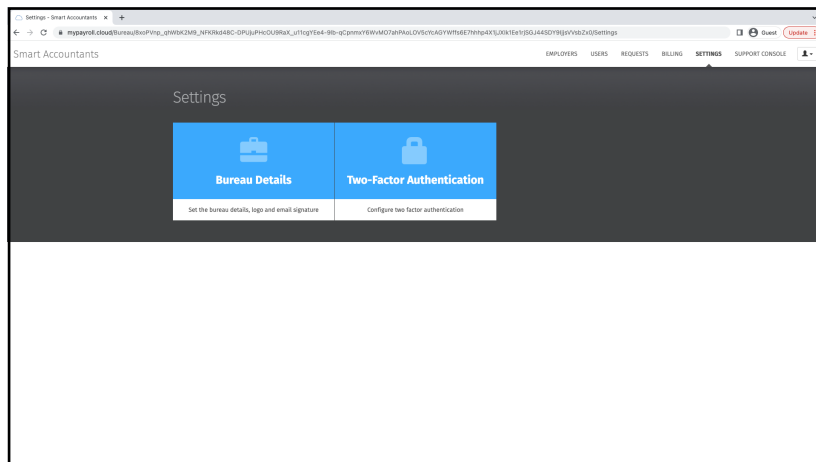
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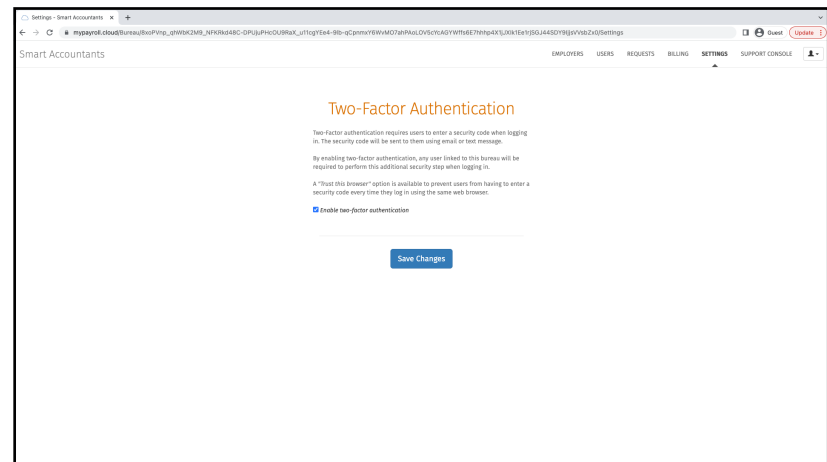
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BrightPay Connect
Employee Smartphone & Tablet App

GET IT ON Google Play | Download on the App Store

86

Notification Access
When you receive pay slips or from that is available

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Pay Slip Library
With current and historic pay slips on the smartphone

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Pay Slip Calendar
With all past and historic pay slips

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Personal Details

View all of your personal
some details

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Google Play

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App Store

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Using BrightPay Connect to
improve your business'
profitability

91

Bright

Four tried and tested pricing
strategies



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Bright

Option 1: Set fee per employee

- BrightPay Connect brings value to the client and their employees
- Employees will become more accustomed to using the app
- Employees have access to payslips and request annual leave


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Option 2: Best things in life are free


- Add the cost of Connect into your standard payroll fees
- It can (and should) be a gateway to your other services
- The more they rely on you, the quicker they will turn to you

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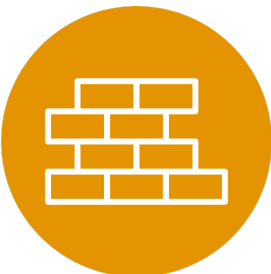


Option 3: Customer referral strategy

- 20-50% of purchasing decisions are based on word of mouth
- Don't limit the power of referrals: give clients a reason to refer
- When the value is ambiguous it increases the value perception



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Option 4: Build up to build in

- Build the cost of Connect into your annual fees
- Very simplistic and easy to understand approach
- Reap the benefits of an online payroll portal

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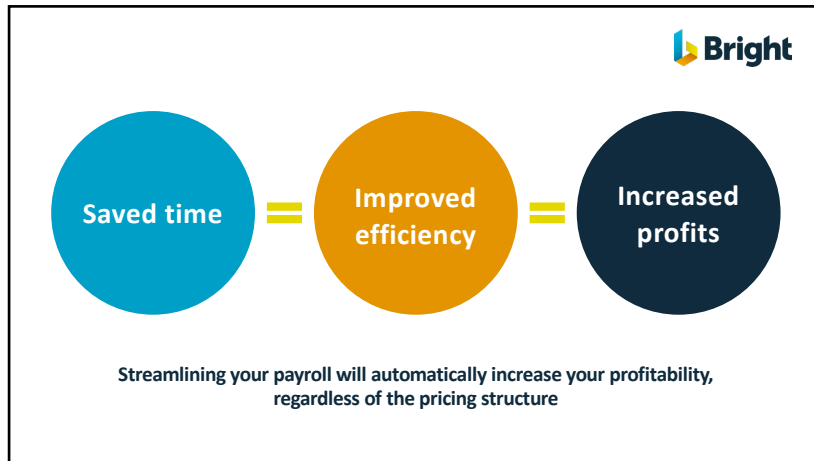


Top tips!

- 1 Communicate Effectively
- 2 Be realistic



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Home to multi award-winning payroll, accounting, practice management, tax and HR software

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Questions and answers

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