



Case Study

Why a Sage user switched to BrightPay



LifeStyles Accountancy



A case study on how a chartered accountancy practice uses BrightPay to deliver payroll services above their clients' expectations

In Summary

Challenge

- Find a more efficient payroll software
- Must have a modern, user-friendly interface
- Requires cloud access to payroll information
- Requires a payroll portal for clients
- Provide employees with secure access to their payslips

Solution

- An intuitive software with easy-to-follow processes
- A software with a clean layout and is user friendly
- A software that provides cloud access to the payroll information
- A self-service portal for clients and an app for employees

Why BrightPay?

- Over 98% of new users find BrightPay 'easy-to-use' based on the software's functionality and interface
- BrightPay Connect, the cloud extension, offers online access to the payroll data
- BrightPay Connect also includes an online client portal and an app for employees

Results and Benefits

- LifeStyles Accountancy cut the time spent on payroll in half
- On-screen alerts ensure mistakes are avoided
- Payslips can be shared with employees instantly through a secure employee app
- With BrightPay Connect, LifeStyles Accountancy can offer clients additional payroll services such as annual leave management

About LifeStyles Accountancy

LifeStyles Accountancy is a chartered accountancy practice set up by Daniel Styles almost 10 years ago. Eager to move away from the corporate world he had been working in, Daniel created his business with a Christian ethos in mind. His aim is to not only deliver excellent service to his clients but to also give meaningful help where it is needed. The services he offers to his clients include all aspects of accounts, tax, payroll, and business advice.



LifeStyles

Chartered Accountants & Business Advisers



Knowing when to switch payroll software providers

Experienced with Sage from his previous job, Daniel used it to process his clients' payroll when he initially set up his business. However, as the payroll industry advanced and new technologies were launched, Daniel became frustrated with its limitations and lack of progress. Looking for a more responsive, user-friendly software that could support his growing business, Daniel began to look for a new payroll software provider.

Having processed payroll for many years, Daniel had a thorough understanding of what he was looking for from a new software provider. He wanted the program to have a modern interface, so it would be easy to understand. A straightforward software, with less options and fewer buttons to click on, would improve efficiency and, Daniel felt, would reduce the chance of mistakes being made.

Ideally, the new payroll software would provide some cloud functionality, allowing Daniel to work on-the-go when needed, such as when visiting clients. He also wanted an employee self-service portal that would allow him to securely send payslips directly to employees. The number one priority, however, was efficiency – ultimately, the new software program would have to allow Daniel to process payroll quicker.

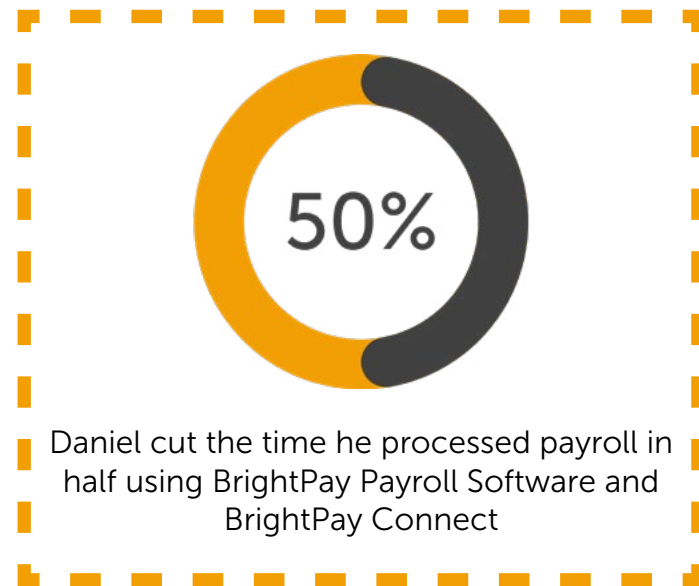
With these detailed criteria in mind, Daniel began to look for a new payroll software. Not convinced of the capabilities of the fully-cloud options available on the market, he looked at software that provided both desktop and cloud functionality. Reading online reviews about BrightPay, Daniel downloaded the **60-day free trial**.

Using BrightPay and BrightPay Connect close to three years now, Daniel estimates he saves half the time he previously spent on payroll. This time is saved by the software having more streamlined

processes. For example, rather than having to email payslips to employees, they are automatically sent to employees through the employee app. Daniel is also more confident he won't miss important payroll duties, such as auto enrolment, because BrightPay alerts him with on-screen flags, notifying him when he has tasks to complete.

Very satisfied with BrightPay and its ease of use, Daniel recommends it to his clients who run their own payroll. Based on his recommendation, even the company he previously worked with 10 years ago, now uses it.

In the following section, we'll look in more detail at Daniel's criteria and priorities for a new payroll software, and how BrightPay addressed each one.





Priority 1: A more efficient payroll software

BrightPay is an award-winning **payroll software** that is fully HMRC recognised and supports all RTI submissions. Learning about BrightPay through reviews and online research, Daniel tested the software by downloading the 60-day free trial. Daniel wasn't simply interested in an easier-to-use software, he wanted it to be efficient - one that could optimise the payroll process, saving him time and energy.

By using a more efficient software, Daniel could spend less time processing payroll. This allows him to focus on other areas of his business, with the possibility of taking on even more clients.



To be truthful, it's a world apart. I'm not saying that so you could necessarily use these buzzwords, but it genuinely is. It's a world apart.

The step-by-step nature of completing the different payroll tasks on BrightPay is one of the main advantages, Daniel told us. Rather than having to remember every single step yourself or click a dozen times to complete a task, he finds it more intuitive and less prone to errors, compared to his previous software. For example, the software automatically monitors any changes to an employee's work status each pay period. Before the re-enrolment date is reached, BrightPay will determine which employees qualify, and if they meet the criteria, on-screen flags and alerts will appear to notify you that you have re-enrolment duties to perform. This can be very helpful, particularly when you're busy. Daniel put it like this:

"I think when you get busy, it's very easy to miss something like **minimum wage, an auto enrolment letter, enrolment of pension, opt out, and all that sort of stuff.** Those are the things you must have focus for. But on BrightPay, you get the alert flag, and you can't do anything until you've fixed it. That does make a lot of difference."

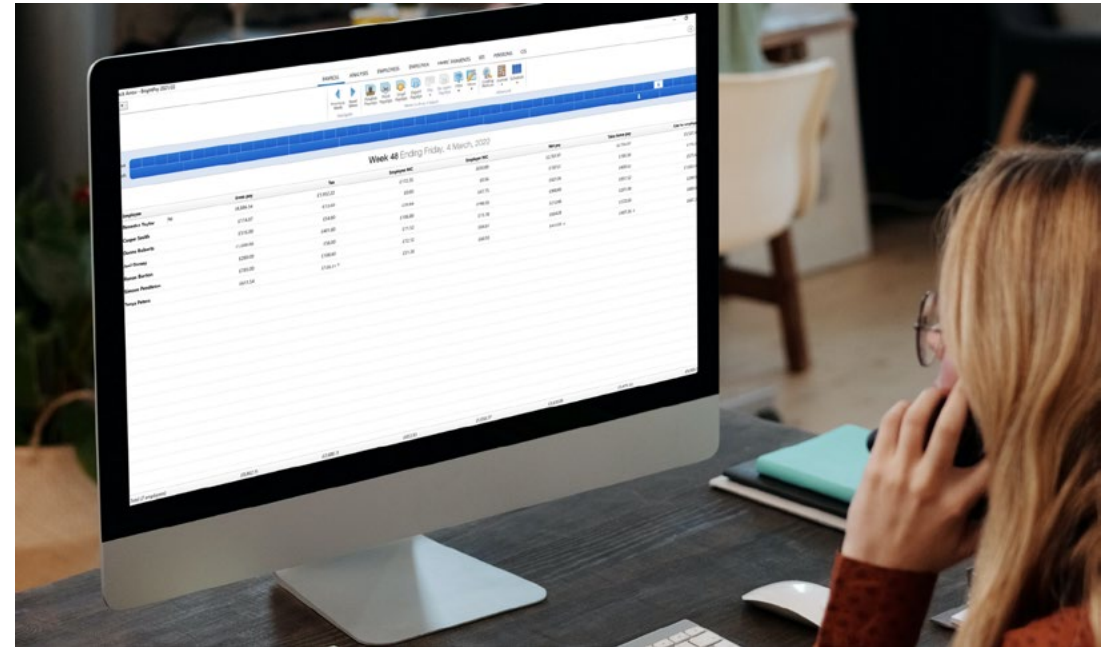
Priority 2: A clean interface

Efficiency and a cleaner interface go hand-in-hand. An intuitive interface works exactly as you would expect it to, so you don't waste time clicking through different options to find what you're looking for. In our latest customer survey, over 98% of new users of the software found BrightPay easy-to-use.

This is further reflected by what Daniel had to say about his clients who process payroll themselves. While they may not have the same payroll experience that Daniel has, they have been able to adopt BrightPay as their payroll software with little difficulty.



They may not necessarily have the expertise or level of experience that I have. But from the second the program loads up and you show them maybe three features, their eyes are lit up and they are saying "this is going to save hours!".

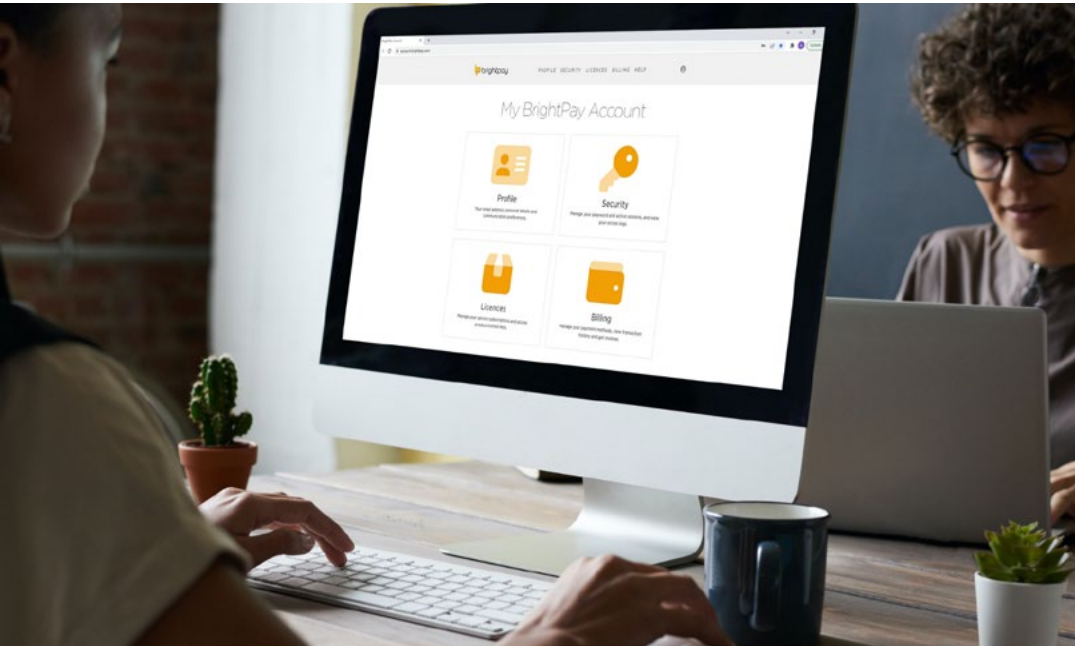


Priority 3: Online access

While Daniel operates his business primarily from his home-office, he also likes to be able work from his laptop when visiting clients. For that reason, he wanted access to the payroll on multiple devices and on the cloud.

BrightPay is a desktop-based payroll software, available on both Windows and Mac OS X. All BrightPay licences come with 10 activations, and this means that the payroll can be processed on up to 10 different devices. **BrightPay Connect** is the cloud extension to the payroll software. With this, Daniel has online access to the payroll data, but the payroll itself is still processed on the desktop application of BrightPay.

Priority 4: Client portal



Finding a payroll software that provided a client portal was a priority for Daniel. Client portals and employee apps have risen in popularity in recent years, and Daniel was aware that they could provide benefits for both himself, and his clients.

Having used BrightPay Connect for over two years now, the employer portal and employee app have become an essential tool for Daniel as it helps him streamline communications, reduce time spent on administrative tasks, and connect payroll with HR.

Daniel feels that BrightPay Connect has proven so useful to his clients that it has added even greater value to his payroll services.

“It’s an impress factor to be honest. Before, payroll was a necessity that my clients had to get through. All that I could really offer, within reason, was to be able to produce it, tell them what to pay the staff and the tax office, and give them their payslips. That was kind of the sum total of it. But with BrightPay Connect I can actually offer them something that they can use themselves to a very helpful degree.”

On the employer portal, his clients can view and run payroll reports whenever they like. Instant access to reports is more convenient for clients and eliminates the need to request them. The payroll approval feature has also proven to be invaluable. With this, Daniel sends the payroll information for each pay period to his client, who then approves it before it is finalised. This helps to catch any mistakes and prevents time from being potentially wasted.

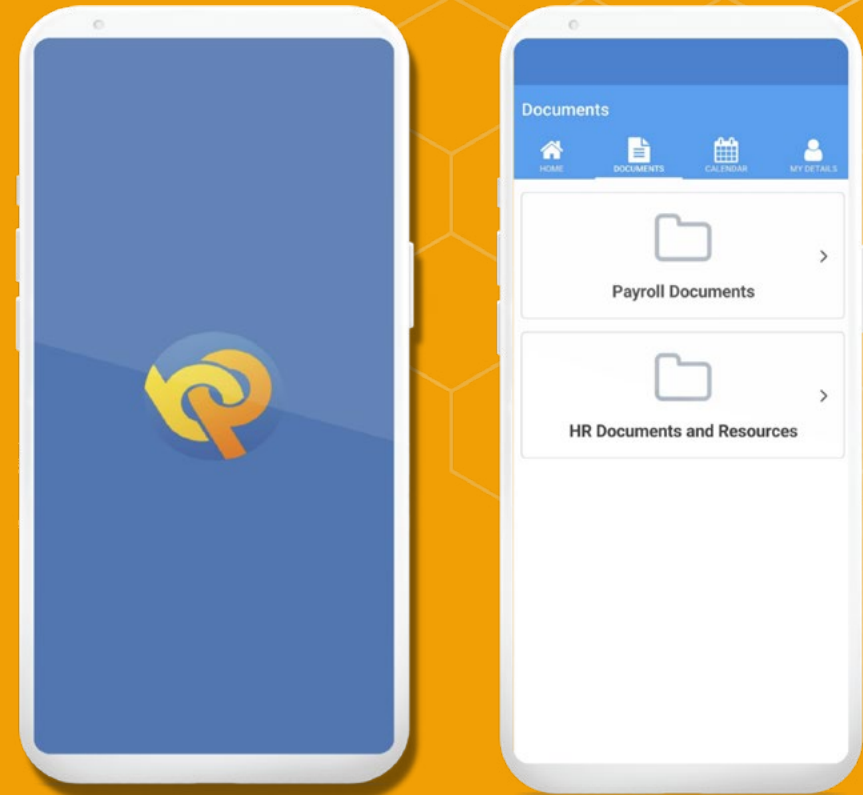
Core features for clients

- Access employees’ payslips and payroll documents
- Review and approve the payroll run
- View and run payroll reports at anytime
- View HMRC payments for the tax year and the amounts due
- Manage a company wide annual leave calendar

Priority 5: Access to an employee app

Having a more secure and quicker way of sending employees their payslips was one of Daniel's main criteria when searching for a new payroll software.

With BrightPay Connect, Daniel can automatically send payslips to the employees, once payroll has been finalised. The employee app provides instant access to payslips for employees, wherever they are. It also provides them with an archive of past payslips. By sending payslips using a secure cloud portal, Daniel ensures that he is complying with GDPR legislation. BrightPay Connect utilises Microsoft Azure which keeps the payslip information safe when it is in transit and when it's being stored.



“

Previously, I emailed payslips to the staff with a password on but I became less and less convinced about the security of it. Also, the amount of times employees were emailing me saying “I deleted my emails, can you resend all of them?” - It was all taking up too much time.”

Unexpected benefits:

BrightPay Connect offers a small but effective branding opportunity for accountants and for their clients. Accountants can add their own logo, company name, and contact details to BrightPay Connect. Or instead, they can, similar to what Daniel does, add their client's logo to the Connect portal. This way, employees see their company logo each time they open the app. Daniel found this to be surprisingly effective with his clients.

“Branding it with their logo makes an absolute massive difference. All of a sudden, they're opening it up and seeing their logo on it. It looks really professional.”

Discover how to improve your payroll process

To discover more about BrightPay and how it can improve your payroll services and save you time, like it did for Daniel, schedule a 15-minute demo with a member of our team today.

[Book a demo](#)

[Start a trial](#)

