### BureauNet Client Import Instructions

When opening the template file, you will see 4 demo clients that contain the formats in which the data needs to be entered.

#### Client Name

This is a free format and so enter the client name as wish to see it.

#### Client Ref

Again, this is free format.

#### HMRC Ref

This is the HMRC reference for your client.

#### Administrator

You must enter the first and surname, with a single space between them, otherwise the system will not accept them.

#### Payroll Freq

You can only enter the following options:

* Weekly
* Fortnightly
* Monthly
* Annually

#### Pay Date Rule

You have the following option for each client:

Last working day of the month, which should be entered as ‘lastworking’

Last Friday of every month, which should be entered as ‘lastfriday’

A specific day in the month, which should be entered as ‘specificdate’

#### Specific Pay Date

You only need to enter a number in this column if your pay date rule is set to “specificdate” or if your payroll frequency is “Weekly”.

If your pay date rule is “specificdate”, and your payroll frequency is “Monthly”, then enter the day of the month in here e.g. for the 28th of the month enter “28”.

If your payroll frequency is weekly, then in the “specificdate” column enter a number e.g.

1 = Monday

2 = Tuesday

3 = Wednesday

4 = Thursday

5 = Friday

6 = Saturday

7 = Sunday

#### Cut Off Day (Number of working days prior to pay date)

Simply enter the number of working in advance of the pay date here.

#### Primary Client Contact

Enter the name of your main contact for your client, normally your payroll manager.

#### Primary Contact Email

Enter the email for your primary contact with your client. This will be the email address they use to login to the portal.

#### Contact Phone

Enter the contact phone number for your client.