

Migrate Client Data to aeExchange User Guidelines



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Migrate Client Data to aeExchange.

You can now easily migrate your client data from the bureau application to aeExchange. We provide you a client data CSV file which you can upload in aeExchange to create client(s) in batch. Once you successfully create the client(s) and setup your pension provider e-filing credentials, you can directly eSubmit your AE pension data to the respective pension provider from the payroll bureau application.

Please follow the steps given below to migrate your client data to aeExchange.

STEP 1: Download Client Data CSV File from Bureau Application

To migrate your client data from payroll bureau to aeExchange, you need to first download the Client Data CSV File from the bureau application. This client data CSV file includes pension scheme setup, AE deferment policy and pay period setup, which can be readily uploaded to aeExchange and create all the clients quickly. Please follow the steps given below to download the Client Data CSV file.

Step 1 : Log into Internet Payroll Bureau application.

Step 2 : Click on 'Manage Clients' link in the bureau main page.

Step 3 : Then click on 'Download Client Data in CSV File (Download Client)' link to download the CSV file.

Road Map :

Manage Clients → Download Client Data in CSV File (Download Client)

Please Note : We recommend you to verify the downloaded CSV file before uploading to aeExchange.

STEP 2: Upload Client Data CSV File to aeExchange.

You can now log in to aeExchange account and then upload client data CSV file . This will help you to create all your clients in one go. Please follow the steps given below to upload client data CSV file.

Step 1 : Log into aeExchange account.

Step 2 : Click on 'Add New Client' link in the Dashboard.

Step 3 : Click on 'Upload New Client CSV File (Import Client)' link.

Step 4 : Now click on 'Upload Client Detail CSV File' link.

Step 5 : Click 'Browse / Choose' to Upload Client Details CSV file.

Step 6 : Finally click on 'Upload CSV File' button.

Road Map :

Dashboard → Add New Client → Upload New Client CSV File (Import Client) → Upload Client Detail CSV File → Browse → Upload CSV File

STEP 3: Uploaded / Imported Client Data Status

Once you upload the CSV file, you can check the **Uploaded / Imported Client Data Status**. Please follow the road map below to check the uploaded status.

Road Map :

Dashboard → Add New Client → Upload New Client CSV File (Import Client) →
Uploaded / Imported Client Data Status

If the Importing Data Status appear as 'Imported', that indicates your client data is uploaded and clients are created successfully in aeExchange. In case of any failure, you need to fix the errors listed and upload the CSV file once again.

Please note : The client reference and Employer ID will be unique for each client and employer respectively. If you have uploaded a CSV file and the status appear as 'Pending' or 'Imported', you cannot upload the CSV file with the same client reference again. If you wish to upload the client with the same client reference you need to remove the old records and then upload the CSV file.