

## GDPR Data Protection Principles and Sage 50 Accounts

Under the General Data Protection Regulation (GDPR), you need to make sure you have policies and procedures in place to cover the data protection principles, you can find more detail about this from [www.dataprotection.ie](http://www.dataprotection.ie) and <http://gdprandyou.ie>. No software application will make you GDPR compliant; however in this guide we have put together some of the key points of the GDPR and how you might use Sage 50 to address these.

With regard to Sage 50 software, you should ensure that you are on the version that is best designed to help with GDPR activities, at time of writing this is version 24.2. If you do not have this version or are unsure what version you are on please contact our support team for help.

Sage 50 Accounts (v24.2) will introduce four new reports to help you to become ready for the General Data Protection Regulation (GDPR). The reports can help you identify contact records in your data and to identify businesses you have not traded with in recent years that can now be deleted. For more information on reporting and removing Sage 50 information can be found <https://pimbrook.ie/knowledge-base/4482/>

### **Fair and lawful processing in a transparent manner**

You need to have a lawful basis for processing personal data. You can find out more about the lawful bases from the [www.dataprotection.ie](http://www.dataprotection.ie) and <http://gdprandyou.ie>.

Sage 50 Accounts is primarily designed to hold the data you need to perform your duties. If you do hold personal data in your software, you should review the purpose for holding the data, and make sure it meets the conditions set out by the GDPR. In many cases, this may be covered by your agreement with your customers and suppliers.

When you submit information to [www.revenue.ie](http://www.revenue.ie) using Sage 50 Accounts, only the information relevant to the submission is sent.

### **Collected for specified legitimate purposes**

Your organisation should have procedures in place for identifying the reason for processing a personal data. You need to have a clear and compelling case for why you need to use a person's data and it's good practice to document the reasoning behind your decision. This also applies to data used for marketing purposes.

### **Adequate, relevant and limited to what's necessary**

You shouldn't collect more data than is necessary for the original purpose. The best practice is to calculate the information you need in order to achieve your goals and document this.

### **Accurate and, where necessary, kept up to date**

You should take reasonable steps to ensure the personal data you hold is accurate and up to date and have a process in place to address how you'll maintain the data you're processing and storing, for example, carrying out regular audits.

### **Kept in a form that permits identification for no longer than is necessary**

The GDPR doesn't set out any specific minimum or maximum periods for keeping personal data, instead, it says you must keep data no longer than is necessary for the purpose you obtained it for. This protects the individual by making sure irrelevant or out of date information is deleted. You should review the length of time you keep personal data for and if you don't already have one, create a retention policy.

You can easily view customer and supplier data in Sage 50 Accounts by browsing their records, and you can also use a custom field to record retention dates for your information. Alternatively, you can record this in your procedures outside of the software.

Once you've identified your retention dates, you need to remove any data that's no longer necessary by editing the records or deleting the records.

### **Processed in a manner that ensures appropriate technical and organisational security**

You should keep the data you hold safe and secure and ensure you have appropriate protection and information security policies, procedures and standards in place. These apply to IT systems, paper records and physical security.

In terms of your software, you must ensure that your computer or network on which it's installed is secure. If necessary, check with your IT support.

### **Consent**

If you have another lawful basis for collecting personal data, you may not always need consent but you need to have policies in place for this. You can find out more from [www.dataprotection.ie](http://www.dataprotection.ie) and <http://gdprandyou.ie>. If you do need consent, you can record this within the software using one of the custom fields to indicate the client has given consent. Alternatively, you may have a process outside of your software for recording this.

## **GDPR Individual Rights and Sage 50 Accounts**

Under the General Data Protection Regulation (GDPR) individuals have increased rights over the personal data you hold on them. This includes the right to know why you're holding their data and what you're using it for, as well as the right to request data is rectified or destroyed.

Sage 50 Accounts is mainly designed to hold the data you need to carry out your duties. However, if you are using it to process personal data, you need to make sure you're aware of an individual's rights.

You should check the procedures within your business to ensure they cover these rights. You can find out more about each right from [www.dataprotection.ie](http://www.dataprotection.ie) and <http://gdprandyou.ie>

### **Right to be informed**

You must tell people what you're doing with their personal data, this includes any personal data you hold in Sage 50 Accounts. In Sage 50 Accounts, you'll hold a certain amount of data about your customers and

suppliers. Your company would normally need a privacy statement or notice to cover this. You can find out more about what type of information you need to inform individuals about from [www.dataprotection.ie](http://www.dataprotection.ie) and <http://gdprandyou.ie>.

### **Right of access**

Individuals have a right to access their personal data, so they are aware of what data you hold and what you're holding it for. They have a right to:

- Confirmation that you're processing their data.
- Access their personal data.
- Access other supplementary information.

If an individual sends you a subject access request, you must send them the relevant information.

### **Right to rectification**

You must make sure that the personal data you hold for individuals is accurate and kept up to date. If an individual asks you to correct their data, you must update this in your software. You must respond to the individual within one month, or two months if the request is complex.

In Sage 50 Accounts the customer and supplier contacts reports can be used to locate individual's names in your records.

You can edit the records that may hold information about individuals, such as their name and email address.

### **Right to erasure (right to be forgotten)**

Unless there's another legal reason for keeping personal data, you must delete or remove the data at the request of the individual.

In Sage 50 Accounts the customer and supplier contacts reports can be used to locate individuals' names in your records.

You can edit the records that may hold information about individuals', such as their name and email address.

### **Right to restrict processing**

Individuals have a right to block or suppress processing of their personal data. If they request this, you can still store their personal data, but you can't process it further. You can keep just enough information about them to make sure the restriction is respected in future.

If necessary, you can amend information within a record to anonymise or remove the non-relevant information.

### **Right to data portability**

If an individual has provided their personal data to you on the basis of consent or contract, they have a right to request that the data is returned to them in a structured, commonly-used and machine-readable format. Machine-readable means the information is structured so that other software can extract the data for example, in an Excel or CSV file, rather than a Word or PDF document.

In Sage 50 Accounts, you can export data from the software in a format that can then be imported into other software if required.

### **Right to object**

Individuals have a right to object to you processing their personal data. This is mainly aimed at using their data for direct marketing, including profiling, however there are other legitimate reasons for objecting.

Right not to be subject to automated decision making, including profiling

Individuals have a right to object to being subject to a decision based solely on automated processing, including profiling. If you use an automated decision-making system, it should allow for a human intervention.

## **Disclaimer**

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