

Sage 200 Technical Tip

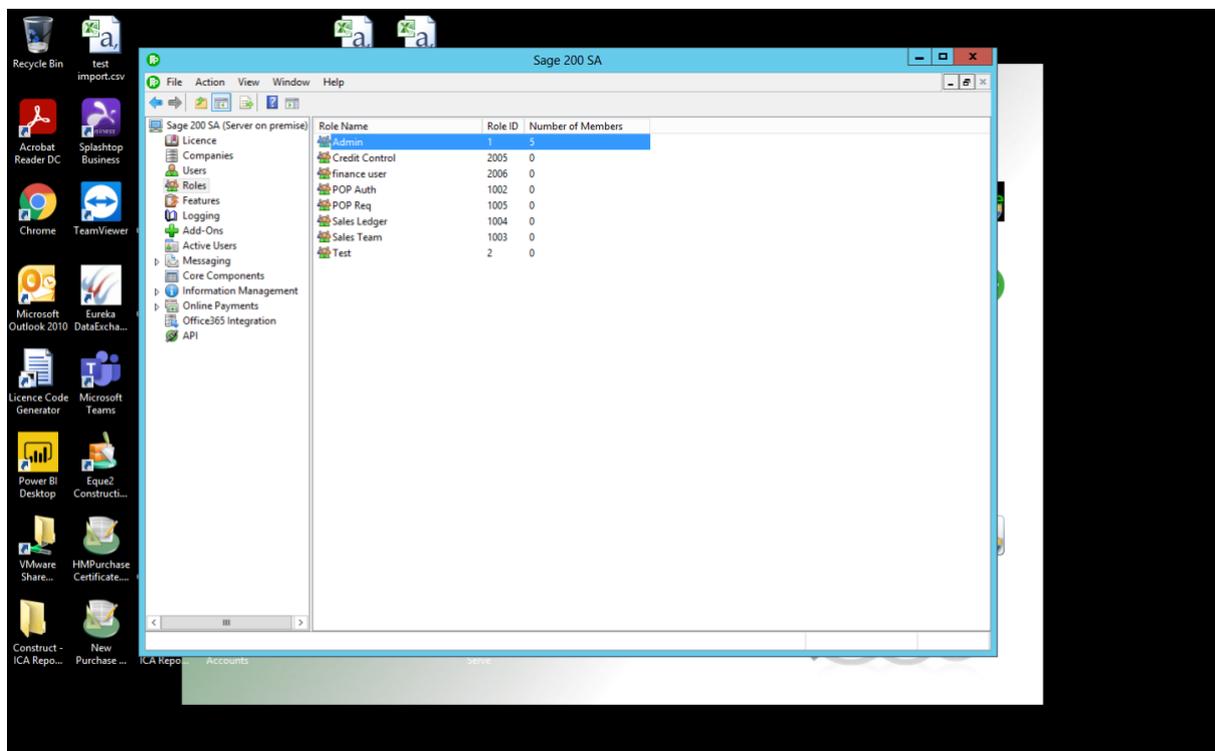
Securing Supplier Bank Details

It is very important to ensure that your supplier Bank Account Details are secure in Sage 200. You may need to prevent most of your users from being able to see and/or amend supplier bank details. Ideally, you would only permit certain users to be able to access this sensitive data.

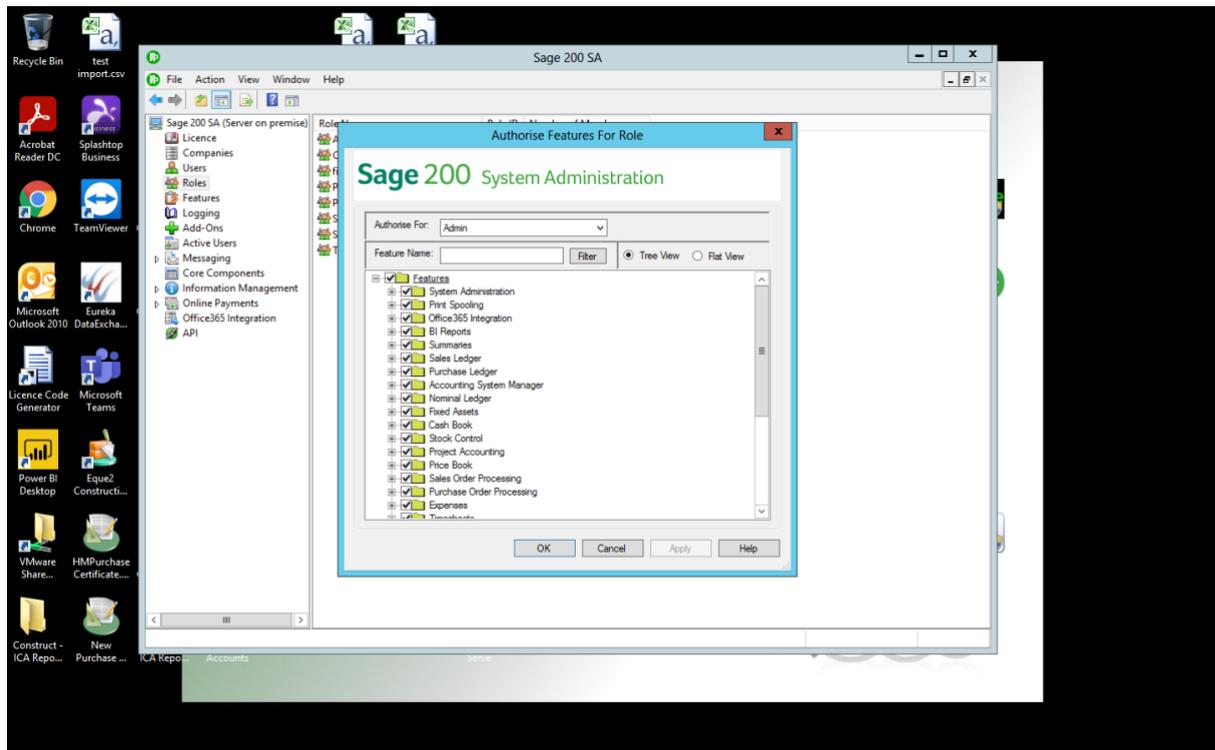
Example: -

I want to only allow the “Admin” Role to have access to Supplier Bank Details :-

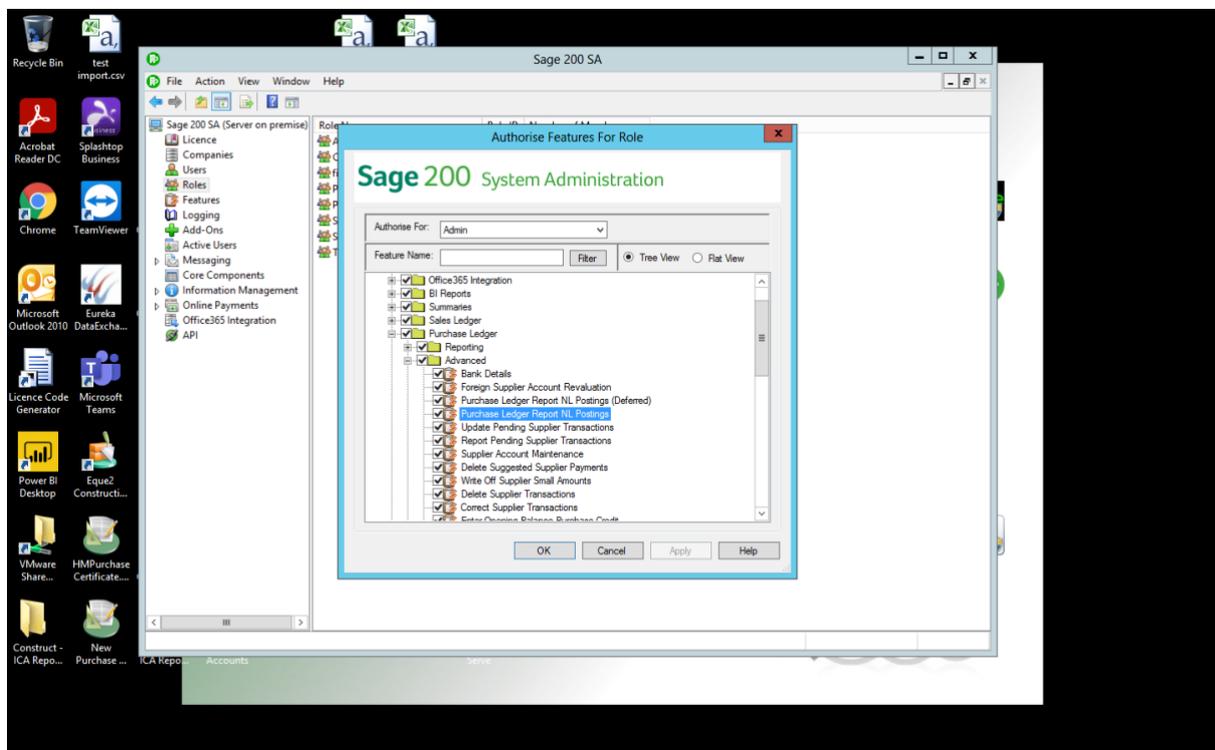
Launch the Sage 200 System Administrator program and choose Roles.



Right-click and then choose Features.



Expand the "Purchase Ledger" option and then expand "Advanced"

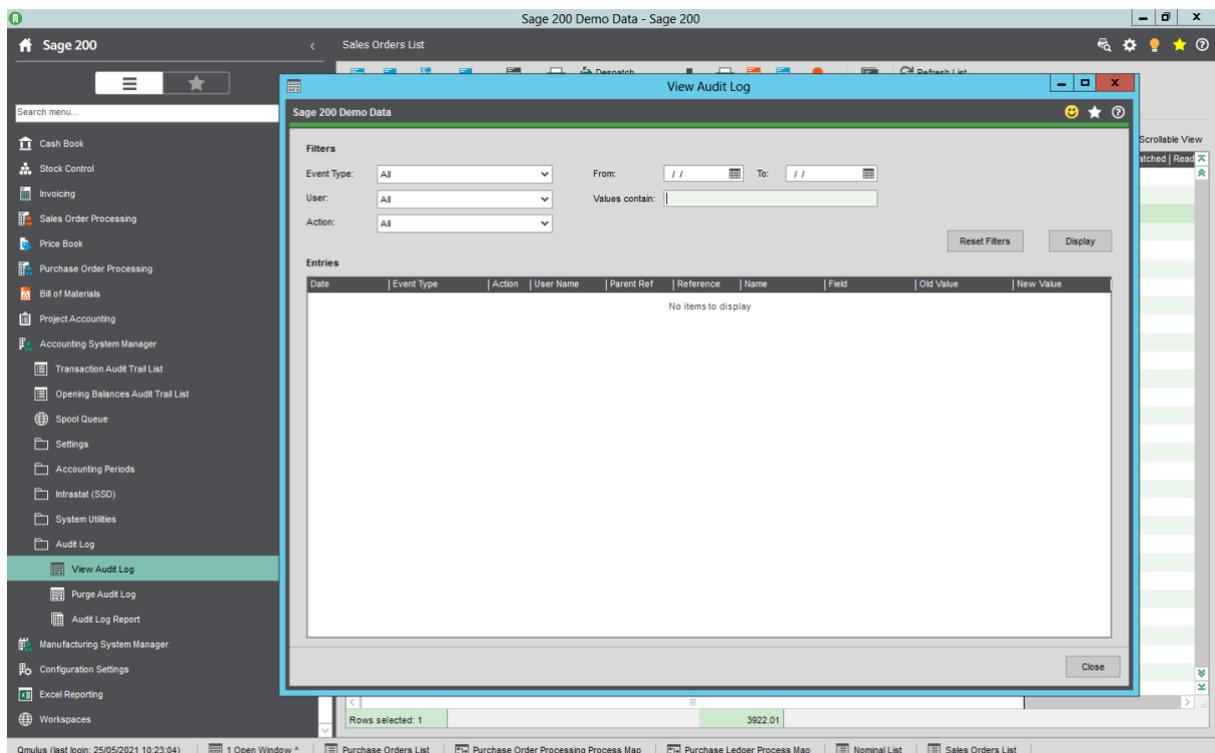


Ensure that the option for “Bank Details” is ticked. This provides view/amend access to the Bank Details specific screen in the supplier record.

You would then do the same process for each of the other Roles you have created and “untick” the Bank Details feature. This would then prevent those users from being able to view or amend the Bank Details screen in the supplier record.

Another function that is very useful to help secure your Supplier Bank Account data is the “Audit Log” function.

Go into Sage 200, Accounting System Manager, Audit Log and then choose “View Audit Log”



Change the Event Type to “Supplier Bank Details”, then choose “Display”.

This will show any amendments to any of your supplier Bank Account details, when the change was made, who made the change and what data was changed :-

The screenshot shows the Sage 200 interface with the 'View Audit Log' window open. The window title is 'Sage 200 Demo Data - View Audit Log'. The filters are set to 'Event Type: Supplier Bank Details', 'User: All', and 'Action: All'. The entries table shows the following data:

Date	Event Type	Action	User Name	Parent Ref	Reference	Name	Field	Old Value	New Value
25/05/2021 14:00	Supplier Bank Details	Amend	Qmulus	BGT001	BGT001	BGT Distributio...	Bank payment ref...	The Kitchen Comp...	Kitchen Designs Ltd
25/05/2021 14:00	Supplier Bank Details	Amend	Qmulus	BGT001	BGT001	BGT Distributio...	Account number	12345678	14562778
25/05/2021 14:00	Supplier Bank Details	Amend	Qmulus	BGT001	BGT001	BGT Distributio...	Sort code	112233	227766

The status bar at the bottom indicates 'Rows selected: 1' and shows a total value of -136136.07 and 20000.00. The taskbar at the bottom shows the user 'Qmulus (last login: 25/05/2021 10:23:04)' and several open windows including 'Purchase Order Processing Process Map', 'Purchase Ledger Process Map', 'Nominal List', 'Sales Orders List', and 'Suppliers List'.