DIANO

DIANO ACADEMY · TRACK A

Running DIANO for your company

The Company Administrator's course: set-up, people, access, documents, files, plans, support and backups

For: The person who runs DIANO for the company (Company Admin) · **Length:** 3 hours (with a 15-minute break) · **Track:** A: Company Administrator · **Version:** 5 November 2026

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Running DIANO for your company

WHO IT IS FOR
The person who runs DIANO for the company (Company Admin)

LENGTH
3 hours (with a 15-minute break)

BEFORE THIS COURSE
A Company Admin login on the practice company. Track E is useful but not needed.

YOU WILL BE ABLE TO
Set up the company and its documents, add people with the right access, run DIANO Drive, choose a plan, log support requests, and keep your own backups.

The Company Administrator keeps DIANO running for everyone else: the company's details, the people and what they may do, how documents look, the shared files, the plan, and the backups. This course follows the order you will do things in.

Your first steps

1. Sign in with your e-mail address and the password you set from DIANO's e-mail.
2. Open **Today** and find the **Getting started** list. Each step has a picture of where to click and a **Do it now** button.
3. **Company profile** first: your company's name, address, VAT number and banking details print on every document.
4. Then the first customer, an item (optional), a quote, an invoice, a delivery note, a receipt and a statement. Each step ticks itself off when DIANO finds the record.
5. **Moving from another program? Do the move first** (see Track S and M17).

- The first time you open Today, a tip offers **Start simple** (a short menu with Customers, Quotes, Invoices, Delivery notes, Receipts and Statements) or **Customize**. **Show everything** brings the rest back.
- **Hide this list** hides Getting started in this browser. Help & Support has **Show the Getting started list**.

Company profile

Settings › Company profile. Each card has its own **Save** and shows **Saved.** when it worked.

Card	What you fill in
Logo and brand colour	A PNG, JPG, WEBP or SVG up to 2 MB, and a brand colour
Business details	Company type, registered name, trading name, registration number (12 digits, e.g. 2019/123456/07), VAT number (10 digits starting with 4) or Not VAT registered, income tax number, CSD supplier number

Card	What you fill in
What your business does	Your industry: DIANO suggests items you probably sell or buy
Contact	The e-mail address printed on documents, and an office phone or mobile
Physical and postal address	Province, city, suburb, street, unit and postal code
Banking details for documents	Bank (DIANO fills in the universal branch code), account holder, number and type
Signature on documents	Authorised signatory, their position, and a signature picture up to 1 MB

- After saving, only the last 4 digits of the account number show. To change it, press **Change banking details**.
- Country and currency are set once. To change them, contact Help & Support.
- Only a Company Admin can change the profile; everyone who may open the page can see it.

Document design

1. **Settings › Document design** (under Company).
2. Look at the designs: Classic, Side by side, Letterhead, Modern, Compact, Bold and Minimal. Click one to see a full page with your own logo and details.
3. Press **Use for all documents**, or choose a type under **Use only for** and press **Use for this type**.
4. Choose a brand colour (or **Pick from the logo**) and the font: Sans serif (Helvetica) or Serif (Times).
5. Tick **Show the company logo** and **Show the banking details** if you want them.
6. Choose a document type and type its **Terms** and **Footer note**.
7. Press **Preview**, then **Save design**.

- The same design is used for the PDF, Print, e-mail, WhatsApp and the share link.
- Delivery notes have a receiving block (DATE RECEIVED, SIGNATURE…). You can add, rename, move or remove its fields.
- If Document design has its own banking text, documents print that text instead of the Company profile's.

Sending documents from your own address

- **Settings › E-mail sending** shows how documents are sent now, the From address and where replies go.
- **Replies go to** your company e-mail from Company profile › Contact. Without it, documents can't be e-mailed.
- DIANO never e-mails your documents from a DIANO address.

- Connecting **Google Workspace / Gmail**, **Microsoft 365 / Outlook** or your **own SMTP server** may not be switched on yet. The page then says so and shows no Connect buttons.
- Until your own address is connected, staff send documents with **Open in my e-mail / Share**, **PDF**, **Print** or **WhatsApp**.
- Under **Sign-off**, type the words for the bottom of every document e-mail.

Adding people

1. **Settings › Users and access.**
2. In the **Add User** card, type the person's full name and e-mail address (they sign in with it).
3. Choose their **role**: Company Admin, Finance User, Sales, Procurement, HR Payroll, Accountant, Auditor or Delivery.
4. Press **Add User**. DIANO e-mails them a link to set their password.

- The e-mail address can't be changed once the person has signed in. To use another address, remove them and add them again.
- If your plan's user limit is reached, DIANO says so. An Accountant doesn't use a paid seat.
- **Invite your accountant** the same way with the role Accountant, then choose **View only** or **Can propose journals**.

Roles: who does what

Role	Typical person	Main screens
Company Admin	Owner, MD, Financial Manager	Everything, plus Settings, approvals and locks
Finance User	Bookkeeper	Sales and supplier money, banking, expenses, journals, reports
Sales	Sales staff	Customers, quotes, sales orders, draft invoices
Procurement	Buyer	Suppliers, requisitions, purchase orders, goods received, stock
Delivery	Driver, dispatch	Delivery notes, with customers, sales orders and stock to look at
HR Payroll	HR or payroll officer	Employees, leave, payroll, HR settings
Accountant	External accountant (free)	Reads the books; can propose journals if allowed
Auditor	Auditor	Reads; changes nothing, can't download or send documents

Changing what a person may see and do

1. In **Users and access**, press ⋯ next to the person.

2. **Edit:** change the name or role, then **Save Changes**.
3. **Access:** choose one or more roles, change the ticks under **What they can open and do**, choose **Records: All** or **Only their own**, choose the **Private details they may see**, and check the **Duties check**. Press **Save**. The person gets an e-mail about the change.
4. **Screens:** tick the screens this person sees; make a screen **View only** or **Can edit**. Never more than their role allows.
5. **View as this person:** see DIANO the way they see it. It is read only. Press **Stop viewing** to go back.

- You can't change your own access: another Company Admin does that.
- **Reset password** e-mails a link that works once, for 1 hour. **Suspend** and **Reactivate** stop and restart a person's access.
- **Same as role (clear all changes)** puts a person back to what their role allows.

Roles and duties

- **Settings › Roles and duties.**
- **Your company's roles:** press **New role**, choose **Start from**, type the role name and **Save role**. Ready-made **Job roles you can start from** include Invoice clerk and Bookkeeper: **Copy and edit**.
- **Duties your company keeps apart:** four rules, for example creating suppliers and also paying them. Each is **Off**, **Warn** or **Strict**. Strict refuses a save that mixes them.
- **People with mixed duties** lists who can do both. **Allow with reason** lets one person do both; the reason is kept in the audit trail.
- "**This needs a second person**" means a step is kept for two people. A company with only one person is never blocked.

Two-step sign-in

Two-step sign-in is **not available yet for the people in your company**. Today they sign in with a password or with Google sign-in. The Trust Centre's roadmap has it coming, with Company Admins required to use it.

- Passwords must be at least 8 characters long.
- Every sign-in is recorded with the time, the account and the internet (IP) address.
- Use a password nobody else knows, and don't share logins: each person gets their own user.

DIANO Drive

1. **DIANO Drive** in the menu: Company drive, My files, Shared with me, Starred, Recent and Recycle bin.
2. **New › Upload files / Upload folder**, or drag files onto the page. **New › New folder** for a folder.

3. **Share with a colleague:** ⋯ › **Share** › add a person or group, choose **View**, **Edit** or **Manage and share**, an end date if you want, then **Save sharing**.
4. **Who sees Company drive folders:** you set access by role and person (**Same as the folder above**, or **Only these roles and people**). My files are private to each person.
5. **Sharing outside the company** is off until a Company Admin turns it on in **Drive settings**. Then the Company Admin and an item's Managers can send a link: View only, View and download, or Upload only (folder), for at most 30 days, with an optional download limit. The outside person gets a one-time code by e-mail. **Revoke** stops a link; turning outside sharing off stops every link at once.

- Deleted files stay in the **Recycle bin** for 30 days. DIANO keeps the previous 10 versions of a file.
- Every company has 2 GB. Uploads stop when it is full; nothing is deleted.
- When someone leaves, the Company Admin can recover their My files from Drive settings.

Bringing data in

- **Settings › Bring data into DIANO.**
- **Move my business from another program › Move to DIANO**: for the whole set of books (see M17 and Track S).
- **Add or update records from a spreadsheet:** Customers, Items or Suppliers. Download the template, choose your .csv or .xlsx, press **Preview**, check every row (Will create, Will update, No change, Error), then press **Import** twice.
- **Undo** a recent import while nothing else uses the records.

Plans and your subscription

Plan	Price (incl. VAT)	Users
Free	R0 a month, for life	1 (the Company Admin); up to 20 invoices a month
Starter	R120 a month	3
Growth	R180 a month	10; adds HR and payroll

- Every new company starts with a 30-day trial of every Growth module. No card is needed. DIANO reminds you on day 23 and day 28.
- If you don't choose a plan, the company moves to Free on day 30. Nothing is deleted; modules Free doesn't include become read only. Other users keep their accounts but can't sign in until you choose a bigger plan. Your accountant signs in free.
- A missed payment: DIANO e-mails you the same day and reminds you during a 7-day grace period, then moves the company to Free.
- **Settings › Plan** to choose a plan; **Settings › Subscription** to pay. Everything switches back on as you left it.
- Add-ons (single modules, an extra user) are listed on the price page as coming soon.

Getting help

1. **Help & Support** in the top bar, then **+ New support request**.
2. Choose what it is about: Something isn't working, I need help doing something, I have a suggestion, A billing question, or Moving to DIANO.
3. Check **How urgent is it?** (Urgent means you can't work, or money is at risk).
4. Say what happened; copy the exact message. Add up to 3 screenshots or PDFs, 5 MB each.
5. Press **Send**. You get a request number (for example SUP-000123) and an e-mail.

- Follow up from **My requests**. **Pending: waiting for you** means DIANO needs something from you.
- A Company Admin also sees the company's other requests.
- **Don't include ID numbers, bank details or payslips in screenshots.**
- The Help Centre has every step: diano.co.za/help/app/. Each article has **Log a request**, which opens the request with the article filled in.

Backups and export

- **Settings › Export my data › Export all company data:** one zip with a spreadsheet (CSV) for every kind of record, a full copy DIANO can read back, and a list of what is inside.
- **Full export with every file:** includes DIANO Drive; DIANO e-mails download links that work for 7 days.
- **Settings › Backups:** DIANO backs up your whole company every day. **Download** a backup for your own copy.
- **Restore into a new copy**, with a reason. DIANO reviews the request. Your live company is never overwritten.
- You can export at any time, even while your company is read only. Only a Company Admin can.

Your administrator checklist

1. Company profile complete; document design chosen.
2. E-mail sending page read; staff know how to send documents.
3. Two Company Admins; every person on the smallest role that fits.
4. Duties kept apart set; screens trimmed for people who need less.
5. Accountant invited (free).
6. DIANO Drive folders and access set; outside sharing on only if needed.
7. Plan chosen before day 30 of the trial.
8. Monthly export saved outside DIANO.