DIANO

DIANO ACADEMY · TRACK G

DIANO for Delivery

Delivery notes, the orders behind them, and proof of delivery: only the screens a Delivery user sees

For: Drivers, dispatch and warehouse staff (the Delivery role) · **Length:** 60 minutes · **Track:** G: General employees · **Version:** 5 November 2026

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WHO IT IS FOR
Drivers, dispatch and warehouse staff (the Delivery role)

LENGTH
60 minutes

BEFORE THIS COURSE
Your DIANO login (a Company Admin adds you). A phone or laptop with a browser.

YOU WILL BE ABLE TO
Find the order to deliver, work with its delivery note, print or save it for signing, and claim back money you spent for work.

This course is for the people who deliver. It covers only the screens the **Delivery** role sees in DIANO. DIANO works in your phone's browser, so you can use it on the road.

Your first day

1. Open the e-mail from DIANO and set your password with the link. Then sign in with your e-mail address and that password.
2. You land on **Today**. Your menu shows only the screens your role and your company allow.
3. Top bar: **My profile** has your own details. **Help & Support** is where you ask for help.
4. Help Centre: short step-by-step answers at diano.co.za/help/app/.
5. Stuck? Press **Help & Support**, then **+ New support request**. Say what you were doing and copy the exact message.

What your menu shows

Screen	What you can do
Delivery notes	Work with delivery notes
Sales orders	Look at the orders to deliver
Customers	Look up the customer's address and phone
Stock	Look at items and stock levels
My expenses	Claim back money you spent for work

Your Company Admin may switch some of these off for you. You can't make or change quotes, invoices or customers.

Two messages you may see

- **"Not available for your role"** or **"You don't have access to this screen"**: your access doesn't include this. Your company sets this, not DIANO. Ask your Company Admin.

- **"This needs a second person"**: your company keeps some steps for two people. Ask a colleague.
- **"Connection lost — your change was not saved"**: check your signal, then press the button again. DIANO does not save a change twice.

Where a delivery note comes from

- The sales team makes the quote, the sales order or the invoice.
- A delivery note is made from it with **Copy to ▸ Delivery note**.
- So the lines on your delivery note match what the customer ordered.

Print it for signing

1. Open the delivery note.
2. Make sure it is final: a Draft can't be printed or sent.
3. Delivery notes show **Print** and **Save/PDF** only. Save the PDF and send it yourself if you need to.
4. Delivery notes have a **receiving block** (DATE RECEIVED, SIGNATURE and so on) for the customer to fill in.

> On a phone, press **Download PDF**. In Safari or on an iPhone, a new tab says "Preparing your document…" and then shows the PDF to print.

Check the order and the customer

- **Sales orders:** see what was ordered, and the customer's purchase order number.
- **Customers:** look up the address, contact person and phone before you leave.
- **Stock:** check that the items are in stock.

Claim back what you spent

1. Open **Accounting**, then **My expenses**.
2. Under **New claim**, fill in the date on the receipt, the amount you paid, the tax on the receipt (if any), what it was for and the type of expense. Press **Save**.
3. Press **Open** on the claim, then **Take photo** to add the slip.
4. Press **Submit for approval**.

Someone else approves it. Nobody approves their own claim, unless the company has only one user.

Common mistakes

- **Trying to print a Draft.** It must be final first.

- **Changing an address yourself.** You can look at customers, not change them. Tell Sales.
- **Losing the slip.** Take the photo for My expenses at once.
- **Sharing a login** to get past "Not available for your role". Ask your Company Admin.

Exercises (practice company)

1. Sign in as **Johan Botha (Delivery)** on your phone.
2. Open **Sales orders** and find the order your trainer confirmed for **Kopano Construction CC (example)**.
3. Open **Customers** and find Kopano's address and phone.
4. Open the delivery note for that order. Save the PDF and find the receiving block.
5. Try to open **Sales invoices**. What does DIANO say?
6. Start a **My expenses** claim for R120.00 tolls. Take a photo of any paper as the slip. Save it, but don't submit it.

Where to read more

- Help Centre: From quote to payment · Print, download, or share a document · Capture a business expense, or claim one back · "Not available for your role"
- Module courses: M06 Delivery notes · M05 Sales orders · M09 Expenses