DIANO

DIANO ACADEMY · TRACK G

DIANO for Procurement

Suppliers, requisitions, purchase orders, goods received and stock items: only the screens a Procurement user sees

For: Buyers and stores staff (the Procurement role) · **Length:** 90 minutes · **Track:** G: General employees · **Version:** 5 November 2026

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DIANO for Procurement

WHO IT IS FOR
Buyers and stores staff (the Procurement role)

LENGTH
90 minutes

BEFORE THIS COURSE
Your DIANO login (a Company Admin adds you).

YOU WILL BE ABLE TO
Add a supplier for approval, raise a purchase order, send it, record the goods received, and keep stock items up to date.

This course is for the people who buy. It covers only the screens the **Procurement** role sees in DIANO. Every step is also in the Help Centre (diano.co.za/help/app/).

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**.

What your menu shows

Screen	What you can do
Suppliers	Add suppliers and submit them for approval
Purchase requisitions	Ask to buy, and recommend
Purchase orders	Make orders, send them, mark them sent
Goods received	Record what arrived
Stock (Inventory items)	Add and change items
Purchase invoices, Supplier statements	Look at them
My expenses	Claim back money you spent for work

Purchase invoices are captured and paid by a Company Admin or Finance User. Your Company Admin may switch some screens off for you.

Two messages you may see

- **"Not available for your role"**: your access doesn't include this. Ask your Company Admin.
- **"This needs a second person"**: your company keeps some steps for two people. For example, the person who creates a supplier doesn't also release its payments. Ask a colleague.

The whole buying journey

1. Add the supplier and get it approved.
2. If someone must ask before you buy: a purchase requisition.
3. Make the purchase order; a Company Admin approves it.
4. Send the order to the supplier, then **Mark sent**.
5. When the goods arrive: record the goods received.
6. The supplier's invoice is captured by Finance, and someone else approves it.
7. Finance pays it.

DIANO checks the order, the goods received and the invoice against each other (the three-way match).

Add a supplier

1. Open **Procurement & Supply Chain**, then **Suppliers**, and press **+ New supplier**.
2. Fill in the name and details (VAT number, address, payment terms, bank details) and press **Save**. The supplier is a **Draft**.
3. Press ⋯ on the supplier's row, then **Submit for approval**.
4. A Company Admin presses ⋯, then **Approve and activate…**. The supplier is now **Active**.

> Until a supplier is Active you can't approve a purchase order, a bill or a payment for it. Changed bank details on an Active supplier wait for another Company Admin.

Requisitions (optional)

1. Open **Purchase requisitions**, then **+ New requisition**.
2. It goes **Submitted**, **Recommended** and **Approved**.
3. Then **Convert to order** makes a Draft purchase order.

Most small businesses start at the purchase order.

Make and approve a purchase order

1. Open **Purchase orders** and press **+ New purchase order**.
2. Choose the supplier. Type each line's description, quantity and price; press **Add Line** for more. Press **Save Purchase Order**. The order is a **Draft**.
3. A **Company Admin** presses ⋯ on the order's row, then **Approve**. The supplier must be Active.

> A saved purchase order can't be edited yet: Edit only shows it. To change a Draft, cancel it with a reason (⋯, then **Cancel…**) and make a new one.

Send it, and record the goods received

1. Press **View** on the approved order, then **Print** or **Save/PDF**, and send it to the supplier yourself.
2. Press ⋯, then **Mark sent**.
3. When the goods arrive: ⋯, then **Copy to › Goods received** (or **Goods received**, then **+ New goods received note**). Type what arrived and press **Record GRN**.
4. Later: **Mark received** and **Close**.

A Draft order can't be printed or sent: approve it first.

Stock items

1. Open **Procurement & Supply Chain**, then **Inventory items**, and choose the **Items** tab. The page is headed **Stock**.
2. Press **New item**. Type the item code, description, unit, selling price and cost price.
3. Tick **Track stock for this item** for goods you keep in stock, and set the reorder level if you want a warning.
4. Press **Save**.

Suggest items shows items your kind of business usually sells or buys: tick the ones you want and press **Add selected**.

Common mistakes

- **Ordering from a Draft supplier.** It must be Active first.
- **Expecting to edit a saved purchase order.** Cancel it with a reason and make a new one.
- **Sending a Draft order.** Get it approved first.
- **Skipping the goods received note.** The supplier invoice can only be matched to goods received.
- **Changing a supplier's bank details without telling anyone.** They wait for another Company Admin, on purpose.

Exercises (practice company)

1. As **Lerato Khumalo (Procurement)**, add **Bolt & Nut Wholesale (example)** from suppliers.csv. Submit it for approval.
2. Your trainer approves it (as a Company Admin). Check that it shows **Active**.
3. Make a purchase order to Bolt & Nut: 20 × BLT-M12 at R240.00. Save it.
4. Your trainer approves the order. Save the PDF, then **Mark sent**.
5. Record a goods received note for 15 of the 20 boxes.
6. Try to open the purchase invoice screen and capture a bill. What can you do there?

Where to read more

- Help Centre: From supplier to payment · Add a supplier · Create and approve a purchase order · Capture a supplier invoice (bill) · Add an item (stock or service)
- Module courses: M13 Suppliers and purchases · M12 Stock · M09 Expenses