DIANO

DIANO ACADEMY · CHECK

DIANO for Sales: the check

Answer on your own. Choose one answer for each question unless it says otherwise.

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DIANO for Sales: the check

NAME	DATE
COMPANY	SCORE / 12

1. You are a Sales user. What happens when you save a new invoice?

- ☐ a) It is issued and numbered at once
- ☐ b) It is saved as a Draft for a Company Admin or Finance User to issue
- ☐ c) It is e-mailed to the customer
- ☐ d) It is deleted after 30 days

2. Which field must you fill in to save a new customer?

- ☐ a) The VAT No
- ☐ b) The Customer Name
- ☐ c) The Credit Limit
- ☐ d) The e-mail address

3. A customer is not VAT registered. What do you do on the customer card?

- ☐ a) Leave the VAT No empty and tick Not VAT registered
- ☐ b) Type 0000000000 as the VAT No
- ☐ c) Type the registration number in the VAT No field
- ☐ d) Nothing: DIANO guesses

4. What happens when you press Issue quote?

- ☐ a) The quote is deleted
- ☐ b) Its number, date and lines are fixed
- ☐ c) It becomes an invoice
- ☐ d) It is sent to the customer by itself

5. You need to change a quote you already issued. What do you do?

- ☐ a) Edit the lines directly
- ☐ b) Ask DIANO Support
- ☐ c) Press ···, then Edit (new revision)
- ☐ d) Cancel the customer

6. The customer accepts, but you deliver before you bill. Which do you create from the quote?

□ a) A credit note
□ b) A sales order
□ c) A purchase order
□ d) A receipt

7. Which quote CAN be turned into an invoice?

□ a) A Declined quote
□ b) An Expired quote
□ c) An issued quote the customer accepted
□ d) A Cancelled quote

8. Can you WhatsApp a Draft invoice to the customer?

□ a) Yes, from the WhatsApp button
□ b) No: drafts can't be printed or sent
□ c) Yes, but only on a phone
□ d) Only as a Word file

9. You see "Not available for your role". What does it mean?

□ a) DIANO is broken
□ b) Your access doesn't include this; your company sets it. Ask your Company Admin
□ c) Your password has expired
□ d) The customer is blocked

10. How do your documents go out by e-mail today?

□ a) From a DIANO e-mail address
□ b) With Open in my e-mail / Share, from your own e-mail program (or PDF, WhatsApp)
□ c) DIANO posts them
□ d) They can't be sent

11. Where do you see which customers owe money?

□ a) Accounting, then Reports, then Debtors ageing
□ b) Settings, then Company profile
□ c) My profile
□ d) DIANO Drive

12. You paid R85 for parking at a customer. How do you get it back?

□ a) Add it to the customer's invoice

□ b) Accounting › My expenses › New claim, add the receipt, Submit for approval

□ c) Post a journal

□ d) E-mail the bookkeeper a photo

Pass mark: 10 out of 12. Your trainer marks this check. Nothing you write here is stored by DIANO.