DIANO

DIANO ACADEMY · TRACK G

DIANO for Sales

Customers, quotes, sales orders and invoice drafts: only the screens a Sales user sees

For: Sales staff (the Sales role) · **Length:** 75 minutes · **Track:** G: General employees · **Version:** 5 November 2026

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DIANO for Sales

WHO IT IS FOR
Sales staff (the Sales role)

LENGTH
75 minutes

BEFORE THIS COURSE
Your DIANO login (a Company Admin adds you). No other course needed.

YOU WILL BE ABLE TO
Add a customer, make and issue a quote, turn it into a sales order or an invoice draft, and hand the draft over for issuing.

This course is for the people who sell. It covers only the screens the **Sales** 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 for everything in DIANO, at diano.co.za/help/app/.
5. Stuck? Press **Help & Support**, then **+ New support request**. Copy the exact message if there was one.

What your menu shows

Screen	What you can do
Customers	Add and change customers
Quotes	Make, issue and convert quotes
Sales orders	Make and confirm orders
Sales invoices	Make and save drafts (a Company Admin or Finance User issues them)
Delivery notes, Statements	Look at them
Stock	Look at items, prices and stock levels
My expenses	Claim back money you spent for work
Reports	Debtors ageing: who owes us

Your Company Admin may switch some of these off for you. Sales orders, delivery notes and statements need the Starter or Growth plan.

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 to do this step.
- **"Connection lost — your change was not saved"**: check your internet connection, then press the button again.

Add a customer

1. Open **Sales**, then **Customers**, and press **+ New customer**.
2. Type the **Customer Name**. It is the only field you must fill in.
3. Type the **VAT No** if the customer is VAT registered. If they are not, tick **Not VAT registered**.
4. Add the Registration No, address, e-mail, phone numbers, Credit Limit and Payment Terms if you have them.
5. Press **Save Customer**.

> A tax invoice over R5 000 also needs the customer's address and VAT number. To change a customer, press **Edit** on its row.

Make a quote and issue it

1. Open **Sales**, then **Quotes**, and press **+ New quote**.
2. Choose the customer, check the **Valid until** date, add the lines and press **Save**.
3. Press **Issue quote**. Its number, date and lines are then fixed.
4. Send it: **PDF**, **WhatsApp**, **Open in my e-mail / Share** or **Print**.

To change an issued quote, press ⋯, then **Edit (new revision)**. DIANO makes a new Draft quote from it.

When the customer says yes

- **Straight to an invoice:** open the quote, press ⋯ and choose **Create invoice**. Check it and press **Save**. The quote shows **Converted**.
- **Deliver first:** choose **Create sales order**. DIANO asks for the customer's purchase order number. Press **Confirm order**. When you are ready to bill, press ⋯ on the order and choose **Create invoice**.
- A Cancelled, Converted, Declined or Expired quote can't be turned into an invoice.

Your invoice draft and the hand-over

1. Open **Sales**, then **Sales invoices**, and press **+ New invoice** (or create it from the quote).
2. Choose the customer, check the dates, type the **Customer PO No.** if there is one.
3. Add the lines with **+ Add line**. DIANO works out the VAT and the total.
4. Press **Save**. The invoice is a **Draft**.
5. A **Company Admin or Finance User** sees it on **Today** under **Draft invoices to issue**, checks it and issues it. Only then does it get its number.

Drafts can't be printed or sent. A Draft can be cancelled (⋯, then **Cancel…**, with a reason) by Sales.

Sending documents

- Only an issued quote or invoice can be printed or sent.
- **PDF** saves the file. On a phone, press **Download PDF**.
- **WhatsApp:** on a phone the PDF is attached; on a laptop WhatsApp opens with a message and a secure link.
- **Open in my e-mail / Share:** your own e-mail program sends the PDF.
- DIANO never sends your documents from a DIANO address. **Email** works only once your company's own mailbox is connected, and that may not be switched on yet.

Who owes us, and claims

- **Debtors ageing:** open **Accounting**, then **Reports**, and choose **Debtors ageing** to see customers who owe you.
- **My expenses** (you paid for something for work): open **Accounting**, then **My expenses**. Under **New claim**, fill in the date on the receipt, the amount, the tax (if any), what it was for and the type. Press **Save**, then **Open**, add the receipt with **Take photo** or **Attach files**, and press **Submit for approval**.
- Nobody approves their own claim, unless the company has only one user.

Common mistakes

- **Waiting for a draft to "go out by itself".** A Company Admin or Finance User must issue it. Tell them it's there.
- **Sending a draft.** Issue the quote, confirm the order or get the invoice issued first.
- **Missing VAT number.** Fill in the customer card, or tick Not VAT registered.
- **Changing an issued quote.** Use **Edit (new revision)** instead.
- **Sharing a login** to get past "Not available for your role". Ask your Company Admin instead.

Exercises (practice company)

1. As **Sipho Dlamini (Sales)**, add the customer **Karoo Solar Installers (example)** if it isn't there, with its VAT number from customers.csv.
2. Make a quote for Karoo Solar: 6 × STL-AN50 and 2 hours SRV-WELD. Save it and press **Issue quote**. Save the PDF.
3. Turn the quote into a sales order. Use the PO number "KS-TRAIN-1". Confirm the order.
4. From the order, create the invoice and save it as a Draft. Try to find an **Issue** button.
5. Ask your trainer (as the Finance User) to issue it from **Today**. Note the invoice number.
6. Open **Debtors ageing** and find Karoo Solar.
7. Start a **My expenses** claim for R85.00 parking at a customer. Save it, but don't submit it.

Where to read more

- Help Centre: Add a customer · Make a quote and turn it into an invoice · From quote to payment · Create and issue a sales invoice · Print, download, or share a document · Who owes us (ageing) · Capture a business expense, or claim one back
- Module courses: M01 Customers · M02 Quotes · M03 Sales invoices · M05 Sales orders · M08 Statements · M09 Expenses