DIANO

DIANO ACADEMY · MODULE COURSE M01

Customers

Add, change and import the people and businesses you sell to

For: Company Admin, Finance User and Sales · **Length:** 20 minutes · **Track:** M: Per module · **Version:** 5 November 2026

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Customers

WHO IT IS FOR
Company Admin, Finance User and Sales

LENGTH
20 minutes

BEFORE THIS COURSE
None. Your Company profile filled in helps.

YOU WILL BE ABLE TO
Add a customer with the details a VAT-correct invoice needs, change one, and bring a list in from a spreadsheet.

Every quote, invoice and statement starts with a customer. This course follows the Help Centre article **Add a customer** (diano.co.za/help/app/add-customer.html) and **Add or update records from a spreadsheet** (diano.co.za/help/app/spreadsheet-import.html).

Who does what

- **Company Admin, Finance User and Sales** add and change customers.
- **Delivery, the Accountant and the Auditor** can see customers but not change them.
- Importing from a spreadsheet: a **Company Admin or Finance User**.

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**, **CSD No**, address, e-mail, phone numbers, **Credit Limit** and **Payment Terms** if you have them.
5. Press **Save Customer**.

To change a customer later, press **Edit** on its row in the list.

Why the VAT number matters

- The **VAT No** (or "Not VAT registered") prints in the customer's box on your quotes and invoices.
- A tax invoice over R5 000 also needs the customer's address and VAT number.
- A customer can't have a VAT number and be ticked **Not VAT registered** at the same time.
- When you issue an invoice to a customer with neither, DIANO warns you first (**Customer VAT number missing**).

Bring a list in from a spreadsheet

1. Open **Settings** and choose **Bring data into DIANO**.
2. Under **Add or update records from a spreadsheet**, press **Choose a spreadsheet**.

3. Under **Records**, choose **Customers**. Press **Download the template** if you want DIANO's file to fill in.
4. Choose your .csv or .xlsx file and press **Preview**.
5. Check every row: **Will create**, **Will update**, **No change** or **Error**, with the reason. Fix errors in your file and preview again.
6. Press **Import**, then press it again to confirm.

> Nothing is saved before you press Import twice. Under **Recent imports**, **Undo** takes an import back while nothing else uses the imported records. Moving a whole business from another program? Use **Move to DIANO** instead (course M17).

Common mistakes

- **Typing a VAT number and also ticking Not VAT registered.** DIANO refuses it: choose one.
- **Leaving out the address of a VAT-registered customer** you invoice for more than R5 000.
- **Adding the same customer twice** when importing a file without a code column.
- **Using the spreadsheet import to move a whole business.** Use Move to DIANO for that.

Exercise (practice company)

1. As **Sipho Dlamini (Sales)**, add **Karoo Solar Installers (example)** with VAT No 4000000107, e-mail admin@karoo-solar.example and Payment Terms 30 days. Save.
2. Add **Mr S. Example (cash customer, example)** and tick **Not VAT registered**.
3. Try to type a VAT number on Mr S. Example while Not VAT registered is ticked. What does DIANO say?
4. As **Ayesha Patel (Finance User)**, import practice-company/customers.csv with **Preview**. Read the row statuses, but press **Import** only if your trainer says so.

Where to read more

- Help Centre: Add a customer · Add or update records from a spreadsheet · Choose how your documents look (Document design)
- Next course: M02 Quotes, M03 Sales invoices