DIANO

DIANO ACADEMY · MODULE COURSE M02

Quotes

Make a quote, issue it, and turn it into an invoice or a sales order

For: Company Admin, Finance User and Sales · **Length:** 25 minutes · **Track:** M: Per module · **Version:** 5 November 2026

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Quotes

WHO IT IS FOR
Company Admin, Finance User and Sales

LENGTH
25 minutes

BEFORE THIS COURSE
M01 Customers.

YOU WILL BE ABLE TO
Make and issue a quote, change it with a new revision, and convert it when the customer accepts.

A quote is where most sales start. This course follows **Make a quote and turn it into an invoice** (diano.co.za/help/app/quote-to-invoice.html) and **From quote to payment: the whole sales journey** (diano.co.za/help/app/quotes-invoices-receipts.html).

Who does what

- **Company Admin, Finance User and Sales** make quotes.
- The **Accountant and Auditor** can see them.
- Turning a quote into an invoice makes an invoice: a Sales user's invoice stays a Draft until a Company Admin or Finance User issues it.

Make and issue a quote

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 to the customer: **PDF**, **WhatsApp**, **Open in my e-mail / Share** or **Print**.

> Drafts can't be printed or sent. Issue the quote first.

Change an issued quote

- Press ⋯, then **Edit (new revision)**. DIANO makes a new Draft quote from it.
- The issued quote stays as it was, so you always know what the customer saw.

When the customer accepts

1. Open the quote, press ⋯ and choose **Create invoice**, or **Create sales order** if you deliver first.
2. **Create sales order** asks for the customer's purchase order number first.
3. Check the new invoice and press **Save**. The quote shows **Converted**.

The quote's status	Can it become an invoice?
Issued	Yes
Converted	No: it already has one
Cancelled, Declined or Expired	No

Buy for a quote

- **Copy to ▸ Purchase order** makes a Draft order to a supplier with the same lines. You choose the supplier.

Common mistakes

- **Sending a Draft quote.** Issue it first.
- **Trying to edit an issued quote.** Use Edit (new revision).
- **Trying to invoice an expired or declined quote.** Make a new quote, or a new revision.
- **Forgetting the customer's PO number** when you make a sales order.

Exercise (practice company)

1. As **Sipho Dlamini (Sales)**, make a quote for **Coastal Cold Storage (Pty) Ltd (example)**: 3 × FAB-RACK and 1 × SRV-DEL. Save and issue it.
2. Save the PDF and check the customer's VAT number in the TO box.
3. The customer wants 4 racks. Use **Edit (new revision)**, change the quantity and issue the new quote.
4. The customer accepts. Use **⋯ › Create invoice** and save the invoice. Check that the quote shows **Converted**.

Where to read more

- Help Centre: Make a quote and turn it into an invoice · From quote to payment: the whole sales journey · Print, download, or share a document
- Next course: M03 Sales invoices, M05 Sales orders