DIANO

DIANO ACADEMY · MODULE COURSE M03

Sales invoices

Create, issue, send, void and correct a VAT-correct invoice

For: Company Admin, Finance User and Sales · **Length:** 30 minutes · **Track:** M: Per module · **Version:** 5 November 2026

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Sales invoices

WHO IT IS FOR
Company Admin, Finance User and Sales

LENGTH
30 minutes

BEFORE THIS COURSE
M01 Customers. Your Company profile filled in (VAT number and banking details).

YOU WILL BE ABLE TO
Make an invoice, issue it, send it, and fix a wrong one the right way.

This course covers the invoice from the first line to the customer's inbox, and what to do when one is wrong. Every step is in the Help Centre article **Create and issue a sales invoice** (diano.co.za/help/app/create-invoice.html).

Who does what

- **Company Admin, Finance User and Sales** create invoices.
- **Only a Company Admin or Finance User issues them.** A Sales user saves a Draft.
- A Company Admin or Finance User sees Sales drafts on **Today** under **Draft invoices to issue**.
- Anyone who may see an issued invoice can send it, except the Auditor.

Make an invoice

1. Open **Sales**, then **Sales invoices**, and press **+ New invoice**.
2. Search for the customer and choose them. Check the date and the due date. Type the **Customer PO No.** if the customer gave you one.
3. If you like, type a **Description**. It prints in bold above the lines.
4. Add each line with **+ Add line**: the item or a description, the quantity, the unit price and the tax code. DIANO works out the VAT and the total.
5. Press **Save**. The invoice is a **Draft**: you can still change it.

Issue it

1. Press **Issue**. DIANO asks: **Issue this invoice?**
2. The invoice gets its number now.
3. After that it can only be **voided** (with a reason) or **credited**.

> If the customer has no VAT number and is not marked **Not VAT registered**, DIANO warns you first (**Customer VAT number missing**). Press **Go back** and fix the customer, or **Issue without it**. A tax invoice over R5 000 also needs the customer's address and VAT number.

Send it

- Only an **issued** invoice can be printed or sent. On a Draft, **Issue now** sits next to the greyed-out Print, PDF and Email buttons.
- **PDF** saves the file. **Print** opens the print window.
- **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.
- **Email** sends from your company's own address, once it is connected in **Settings › E-mail sending**. DIANO never sends your documents from a DIANO address.

When an invoice is wrong

The situation	What you do
It is still a Draft	⋯, then **Cancel…**, with a reason.
Issued, no payments, completely wrong	⋯, then **Void…**, with a reason. It keeps its number and shows Voided. Make a new one.
Issued, part of it is wrong	Raise a **credit note** (⋯, then **Raise credit note**). See M04.
A payment is recorded against it	Reverse the receipt first (Sales › Receipts › Reverse, with a reason), then void or credit it.

Nothing is deleted. That is how your audit trail stays complete.

Common mistakes

- **Trying to edit an issued invoice.** DIANO says "An issued invoice can't be changed". Void or credit it instead.
- **Forgetting the customer's VAT number.** Fix the customer card first, then issue.
- **Sending a Draft.** Drafts can't be printed or sent: issue first.
- **Voiding an invoice with a payment on it.** Reverse the receipt first.
- **Waiting for a Sales user's draft to "go out by itself".** A Company Admin or Finance User must issue it from Today.

Exercise (practice company)

1. Sign in as **Sipho Dlamini (Sales)**. Make an invoice for **Kopano Construction CC (example)**: 10 × BLT-M12 and 4 hours SRV-WELD. Save it. Notice that you can't issue it.
2. Sign in as **Ayesha Patel (Finance User)**. Find the draft on **Today** and issue it. Write down its number.
3. Save the PDF, and open **Open in my e-mail / Share** to see how it would go out.

4. Make a second invoice for **Ubuntu Plumbing (example)** (not VAT registered) for 2 × PPE-GLV. Issue it. Look at the heading and the customer's box on the PDF.
5. Void the second invoice with the reason "Training exercise". Check that it keeps its number and shows Voided.

Where to read more

- Help Centre: Create and issue a sales invoice · Send an invoice to a customer · Void or cancel an invoice · "An issued invoice can't be changed" · Print, download, or share a document
- Next course: M04 Credit notes, M07 Receipts and payments