DIANO

DIANO ACADEMY · MODULE COURSE M05

Sales orders

Confirm an order before you deliver, then invoice it

For: Company Admin, Finance User and Sales (Delivery can see orders) · **Length:** 20 minutes · **Track:** M: Per module · **Version:** 5 November 2026

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Sales orders

WHO IT IS FOR
Company Admin, Finance User and Sales (Delivery can see orders)

LENGTH
20 minutes

BEFORE THIS COURSE
M02 Quotes.

YOU WILL BE ABLE TO
Make a sales order from a quote, confirm it, deliver against it and invoice it.

A sales order is the step between "the customer said yes" and "we bill". It is optional: many businesses go straight from the quote to the invoice. This course follows **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 and change sales orders.
- **Delivery** can see sales orders, so the driver knows what is going out.
- The **Accountant and Auditor** can see them.

Make a sales order

1. Open the accepted quote, press ⋯ and choose **Create sales order**.
2. DIANO asks for the customer's purchase order number. Type it.
3. Check the lines and save.
4. Press **Confirm order**.

> Drafts can't be printed or sent: confirm the order first.

Deliver and invoice

1. Need a delivery note? On the sales order, press **Copy to ▸ Delivery note** (course M06).
2. When you are ready to bill, press ⋯ on the order and choose **Create invoice**.
3. Check the new invoice, press **Save**, then **Issue** (a Company Admin or Finance User issues it).
4. The sales order shows **Invoiced**.

Document	Status after this step
Quote	Converted
Sales order	Invoiced
Invoice	Issued, then Partially Paid or Paid

Common mistakes

- **Making a sales order when you don't need one.** It is optional.
- **Sending a Draft order.** Confirm it first.
- **Forgetting to invoice a delivered order.** Look for orders that are not Invoiced at month-end.

Exercise (practice company)

1. As **Sipho Dlamini (Sales)**, make a quote for **Lowveld Agri Co-op (example)**: 1 × FAB-GATE, 4 hours SRV-INST. Issue it.
2. Use ⋯ › **Create sales order**. Use the PO number "LAC-PO-0077 (example)". Confirm the order.
3. Sign in as **Johan Botha (Delivery)** and find the order. Can you change it?
4. As Sipho, use ⋯ › **Create invoice** on the order and save it. Check the order's status.

Where to read more

- Help Centre: From quote to payment: the whole sales journey · Make a quote and turn it into an invoice · Print, download, or share a document
- Next course: M06 Delivery notes