DIANO

DIANO ACADEMY · MODULE COURSE M06

Delivery notes

Send goods out with a note the customer signs

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

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Delivery notes

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

LENGTH
20 minutes

BEFORE THIS COURSE
M02 Quotes or M05 Sales orders.

YOU WILL BE ABLE TO
Make a delivery note from a quote, order or invoice, print it with its receiving block, and know who may change it.

A delivery note goes with the goods. The customer signs the receiving block to say what arrived. This course follows **From quote to payment** (diano.co.za/help/app/quotes-invoices-receipts.html), **Print, download, or share a document** (diano.co.za/help/app/print-pdf-share.html) and **Choose how your documents look** (diano.co.za/help/app/document-design.html).

Who does what

- A **Company Admin** and **Delivery** make and change delivery notes.
- **Finance User, Sales, the Accountant and the Auditor** can see them.
- A **Company Admin** sets the delivery note's design and its receiving block.

Make a delivery note

1. Open the quote, sales order or invoice the delivery is for.
2. Press **Copy to ▸ Delivery note**.
3. Check the lines: what is going out on this trip.
4. Save it.

> Delivery notes show **Print** and **Save/PDF** only. Save the PDF and send it yourself if the customer wants a copy.

Print it for the driver

1. Open the delivery note and press **Print**. In Safari or on an iPhone or iPad, a new tab shows the PDF to print.
2. Or press **PDF** (on a phone, **Download PDF**) to save it.
3. A cancelled document can't be printed.

The receiving block

- Delivery notes have a **receiving block**: DATE RECEIVED, SIGNATURE and so on.

- A Company Admin can add, rename, move or remove its fields in **Settings › Document design**, under **Receiving block (delivery notes)**.
- A Company Admin can also choose a different design just for delivery notes (**Use only for**, then **Use for this type**).

Common mistakes

- **Typing a delivery note from scratch** instead of copying it from the quote, order or invoice.
- **Expecting an Email button.** Delivery notes show Print and Save/PDF only.
- **Losing the signed copy.** Scan or photograph it and keep it in DIANO Drive (course M16).

Exercise (practice company)

1. As **Sipho Dlamini (Sales)**, issue a quote for **Highveld Mining Supplies (example)**: 5 × STL-PL6.
2. As **Johan Botha (Delivery)**, open that quote and press **Copy to ▸ Delivery note**. Save it.
3. Save the PDF and look at the receiving block at the bottom.
4. As **Thandi Mokoena (Company Admin)**, open **Settings › Document design** and add a field "Vehicle registration" to the receiving block. Preview and save.
5. As Johan, save the PDF again and find the new field.

Where to read more

- Help Centre: From quote to payment · Print, download, or share a document · Choose how your documents look (Document design)
- Next course: M12 Stock, M16 DIANO Drive