DIANO

DIANO ACADEMY · MODULE COURSE M12

Stock

Items and services, stock levels, and how documents move stock

For: Company Admin and Procurement (others can view the Stock page) · **Length:** 25 minutes · **Track:** M: Per module · **Version:** 5 November 2026

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Stock

WHO IT IS FOR
Company Admin and Procurement (others can view the Stock page)

LENGTH
25 minutes

BEFORE THIS COURSE
None. M03 Sales invoices and M13 Suppliers and purchases help.

YOU WILL BE ABLE TO
Add an item, track its stock and reorder level, and know which documents move stock and who approves a stock take.

An item is anything you sell or buy: goods you keep in stock, or a service. This course follows **Add an item (stock or service)** (diano.co.za/help/app/add-item.html). Stock levels then move with your documents, for example issued sales invoices and credit notes with goods returned.

Who does what

- A **Company Admin and Procurement** add and change items.
- **Finance User, Sales, Delivery, the Accountant and the Auditor** can see the Stock page.
- A **second person** approves stock takes and write-downs: the person who counts a stock take never approves or posts that same one, unless the company has only one user.

Add an item

1. Open **Procurement & Supply Chain**, then **Inventory items**, and choose the **Items** tab. (The page is headed **Stock**.)
2. Press **New item**.
3. Type the item code, the description, the unit, the selling price and the cost price.
4. Tick **Track stock for this item** for goods you keep in stock, and set the reorder level if you want a warning.
5. Press **Save**.

> **Suggest items** shows items your kind of business usually sells or buys. Tick the ones you want and press **Add selected**. The industry you chose in Company profile drives the suggestions.

What moves stock

Document	What happens to stock
Sales invoice, when issued	Goods go out (and cost of sales is posted)
Credit note with Goods returned to stock ticked	Goods come back

Document	What happens to stock
Stock take	Counts are compared and the differences posted, after a second person approves

Bring items in from a spreadsheet

- **Settings › Bring data into DIANO › Add or update records from a spreadsheet**, then choose **Items** under Records. Preview, check every row, then press **Import** twice (course M01 shows the same steps for customers).

Common mistakes

- **Not ticking Track stock** for goods you keep: DIANO can't warn you when stock is low.
- **Ticking Track stock for a service.**
- **Two items with the same code** in an import file.
- **Forgetting Goods returned to stock** on a credit note when goods came back (M04).

Exercise (practice company)

1. As **Lerato Khumalo (Procurement)**, add item **PPE-HLM, Hard hat (example)**, unit each, selling price 180.00, cost price 110.00. Tick Track stock and set the reorder level to 15.
2. Add **SRV-INSP, Site inspection (example)** as a service: don't track stock.
3. Open **Suggest items** and look at what DIANO suggests for an engineering business. Don't add any.
4. As **Sipho Dlamini (Sales)**, open the Stock page. Can you change an item?

Where to read more

- Help Centre: Add an item (stock or service) · Raise a credit note for an invoice · From supplier to payment · "This needs a second person"
- Next course: M13 Suppliers and purchases