Coming from Sage: the DIANO cheat sheet

Sage terms differ between products and companies. Not sure what a term meant in yours? **Check with your Sage administrator.** Help: diano.co.za/help/app/ · Moving: diano.co.za/help/move/

The words

Sage term	DIANO term	Where in DIANO
Customers	Customers	Sales › Customers
Quotation	Quote	Sales › Quotes
Sales order	Sales order	Sales › Sales orders
Tax invoice	Sales invoice (Tax Invoice)	Sales › Sales invoices
Credit note	Credit note (approved)	Sales › Credit notes
Delivery note	Delivery note	Sales › Delivery notes
Customer receipt	Receipt	Sales › Receipts
Customer statement	Statement	Sales › Statements and ageing
Suppliers	Suppliers (approved before use)	Procurement & Supply Chain › Suppliers
Purchase order	Purchase order (approved)	Procurement & Supply Chain › Purchase orders
Goods received note	Goods received note	Procurement & Supply Chain › Goods received
Supplier invoice	Purchase invoice (bill)	Procurement & Supply Chain › Purchase invoices
Supplier payment	Supplier payment	Procurement & Supply Chain › Payments
Inventory items	Items (stock or service)	Procurement & Supply Chain › Inventory items
Age analysis	Debtors / Creditors ageing	Accounting › Reports
Trial balance, general ledger	Trial balance, General ledger	Accounting › Reports
Income statement	Profit and loss	Accounting › Reports
Balance sheet	Balance sheet	Accounting › Reports
Journal batch	Journal entry (a Company Admin posts it)	Accounting › Journal entries
Cashbook, bank reconciliation	Bank account, Reconcile	Accounting › Bank accounts
VAT201 report	VAT201 return (Preview)	Accounting › Reports › VAT201 return
Closing a period	Lock the month (Company Admin)	Reports › Trial balance › Month end
Users and access rights	Users and access, Roles and duties	Settings › Users and access
Employees, payslips, EMP201	Employees, Payroll, EMP201 (Preview)	HR (Growth plan)

Everyday tasks

Task	In DIANO
Quote → invoice	Open the quote › ⋯ › Create invoice › Save › Issue
Fix an issued invoice	Void with a reason (no payments), or raise a credit note
Customer pays	Sales › Receipts › + New receipt, or on the invoice: Copy to ▸ Receipt
Send a document	Issue it first, then PDF, Print, WhatsApp or Open in my e-mail / Share

Task	In DIANO
New supplier	+ New supplier › Submit for approval › another Company Admin approves
Buy	Purchase order › Company Admin approves › Goods received › Purchase invoice › Payment
Journal	Save as Draft › a Company Admin approves (posts)
Bank	Import statement › match each line › Reconcile to the month-end
Month-end	Month end checklist › fix every ⚠ › Company Admin presses Lock
Need help	Help & Support › + New support request

Move day

1. Start date = the 1st of a month, after last month's VAT (and payroll) is done.
2. In Sage: allocate receipts, payments and credit notes; export on move day, for the **day before** the start date: trial balance (all accounts), **detailed** customer and supplier age analysis, customer, supplier, item and account lists. Excel or CSV, never PDF.
3. DIANO: Settings › Bring data into DIANO › Move to DIANO › upload › fix the checks › **Bring it across** (Company Admin).
4. From the start date, new work goes into **DIANO only**. Keep Sage for a few months to look things up.

Different on purpose

Second person for key steps · **Issued is final** (void or credit, never delete) · **Months are locked** · **Audit trail** of every change · **Roles** decide what each person sees.

Sources: DIANO Help Centre (checked 22 Oct 2026) and Move to DIANO guides (menus checked 18 Oct 2026). Sage is a trademark of its owner; it is named here only to show how terms map.