DIANO

DIANO ACADEMY · TRACK S

Coming from Sage

What's where in DIANO, how the move works, and what is different on purpose

For: Everyone moving from Sage Pastel (Partner, Xpress, 5Ocloud), Sage Business Cloud Accounting, Sage 200 Evolution or Sage Payroll · **Length:** 45 minutes, plus the 2-page cheat sheet · **Track:** S: Coming from Sage · **Version:** 5 November 2026

DIANO, by DIALE Consulting (Pty) Ltd · info@diale.co.za · 087 265 3889

Coming from Sage

WHO IT IS FOR
Everyone moving from Sage Pastel (Partner, Xpress, 50cloud), Sage Business Cloud Accounting, Sage 200 Evolution or Sage Payroll

LENGTH
45 minutes, plus the 2-page cheat sheet

BEFORE THIS COURSE
None

YOU WILL BE ABLE TO
Find the DIANO name and place for what you did in Sage, do the 15 most common tasks, and know what moves across and what to do on move day.

This course helps people who know Sage find their way in DIANO. It doesn't compare the two programs. It only maps the words and the everyday tasks, so that day one in DIANO feels familiar. Sage terms differ between Sage products and versions, and companies set Sage up differently: **where you're unsure what a Sage term means in your company, check with your Sage administrator.**

The words: Sage term → DIANO term

Sage term	DIANO term	Where in DIANO
Customers (debtors)	Customers	Sales › Customers
Suppliers (creditors)	Suppliers	Procurement & Supply Chain › Suppliers
Inventory items	Items (stock or service)	Procurement & Supply Chain › Inventory items (the page is headed Stock)
Quotation / Quote	Quote	Sales › Quotes
Sales order	Sales order	Sales › Sales orders
Tax invoice	Sales invoice (headed Tax Invoice when you are VAT registered)	Sales › Sales invoices
Credit note	Credit note (needs approval)	Sales › Credit notes
Delivery note	Delivery note	Sales › Delivery notes
Customer receipt	Receipt	Sales › Receipts
Customer statement	Statement	Sales › Statements and ageing
Purchase order	Purchase order (approved by a Company Admin)	Procurement & Supply Chain › Purchase orders
Goods received note (GRN)	Goods received note	Procurement & Supply Chain › Goods received
Supplier invoice	Purchase invoice (supplier invoice, bill)	Procurement & Supply Chain › Purchase invoices

Sage term	DIANO term	Where in DIANO
Supplier payment	Supplier payment	Procurement & Supply Chain › Payments
Age analysis	Debtors ageing / Creditors ageing	Accounting › Reports
General ledger	General ledger	Accounting › Reports › General ledger
Trial balance	Trial balance	Accounting › Reports › Trial balance
Income statement	Profit and loss	Accounting › Reports › Profit and loss
Balance sheet	Balance sheet	Accounting › Reports › Balance sheet
Journal / journal batch	Journal entry (approved by a Company Admin)	Accounting › Journal entries
Cashbook / bank account	Bank account (statement import and matching)	Accounting › Bank accounts
Bank reconciliation	Reconcile	Accounting › Bank accounts › Reconcile
VAT report / VAT201	VAT201 return (Preview)	Accounting › Reports › VAT201 return
Period / closing a period †	Month, locked by a Company Admin	Accounting › Reports › Trial balance › Month end
Year-end †	Lock the financial year	Reports › Annual financial statements (Preview) › Overview
Users and passwords / access rights †	Users and access; Roles and duties	Settings › Users and access
Company details	Company profile	Settings › Company profile
Document layouts †	Document design	Settings › Document design
Employees (Sage Payroll)	Employees	HR › Employees
Payslips	Payslips (on the payroll run)	HR › Payroll
EMP201	EMP201 (Preview)	HR › Payroll › EMP201 by month
Leave	Leave	HR › Leave

† Sage products use these words in different ways. Check with your Sage administrator how your company used them before you map your own habits.

Words that need a closer look

Sage word	What to know in DIANO
Batches and "updating" a batch †	DIANO has no batches. Each document is saved, then issued, approved or posted on its own. Check with your Sage administrator how your company used batches.

Sage word	What to know in DIANO
Allocating receipts and payments	In DIANO you choose the invoice when you record the receipt, or apply a payment on account later (Apply to an invoice). Before the move, allocate everything in Sage, or the unpaid-invoice check won't match.
Open item / balance forward †	DIANO brings across each unpaid invoice on its own, so each customer's balance is right from day one. Check with your Sage administrator which method your customers used.
Accountant's area, lock date †	In DIANO your accountant has their own free login (Accountant role), and a Company Admin locks each month.
Recurring transactions †	DIANO has a Recurring screen for invoices, bills and expenses that repeat (Starter and up).
Job costing, point of sale, multi-currency †	Not part of DIANO today. See the Coming soon appendix for what is being built. Check with your Sage administrator whether you use them.

The 15 most common tasks

What you did in Sage	How you do it in DIANO
1. Add a customer	Sales › Customers › + New customer. Only the name is required; add the VAT number or tick Not VAT registered.
2. Make a quote	Sales › Quotes › + New quote › Save › Issue quote.
3. Turn a quote into an invoice	Open the quote › ··· › Create invoice › Save › Issue.
4. Capture a tax invoice	Sales › Sales invoices › + New invoice › Save › Issue. Sales users save a Draft; a Company Admin or Finance User issues it.
5. Correct an invoice	Void it with a reason (no payments), or raise a credit note. Issued invoices can't be edited.
6. Record a customer receipt	Sales › Receipts › + New receipt; choose the invoice. Or on the invoice: Copy to ▸ Receipt.
7. Print or e-mail a document	Issue it, then PDF, Print, WhatsApp or Open in my e-mail / Share.
8. Send statements	Sales › Statements and ageing.
9. Add a supplier	Procurement & Supply Chain › Suppliers › + New supplier; another Company Admin approves it.
10. Place a purchase order	Purchase orders › + New purchase order › Save; a Company Admin approves it; Print or Save/PDF and send it.
11. Capture a supplier invoice	Purchase invoices › + New purchase invoice; choose the order and goods received › Capture invoice; someone else approves.
12. Pay a supplier	Procurement & Supply Chain › Payments › + New payment › Record payment.

What you did in Sage	How you do it in DIANO
13. Post a journal	Accounting › Journal entries › Save as Draft; a Company Admin approves (posts) it.
14. Reconcile the bank	Accounting › Bank accounts › import the statement, match every line › Reconcile.
15. Run the month-end reports	Accounting › Reports: Trial balance, Profit and loss, Balance sheet, ageing; then Month end › Lock.

What moves across, and how

DIANO's **Move to DIANO** (Settings › Bring data into DIANO) has step-by-step pages for each Sage product at **diano.co.za/help/move**: Sage Business Cloud Accounting, Sage Pastel (Partner, Xpress, 50cloud), Sage 200 Evolution and Sage Payroll (Payroll Professional, VIP, Sage 300 People).

File from Sage, for the day before your start date	What it becomes in DIANO
Trial balance (all accounts, CSV or Excel, not PDF)	Opening balances
Detailed customer age analysis (one line per invoice)	Each unpaid customer invoice, so payments and statements are right
Detailed supplier age analysis	Each unpaid supplier invoice
Customer list, supplier list	Customers and suppliers
Inventory item list	Items
Chart of accounts	Your accounts, with each account's kind
Sage Payroll: employee list, year-to-date payroll figures since 1 March, leave balances	Employees, their year-to-date totals, their leave balances

- In Sage Pastel, the trial balance is under **View › General Ledger › Financial Reports › Trial Balance**, and the age analysis under **View › Customers › Monthly Periodic › Age Analysis** (DIANO's Pastel guide, menus checked 18 October 2026).
- Choose output to **Excel** (or File), not the printer or PDF. Don't change the files in Excel before you upload them.
- DIANO compares every figure before anything changes. If a move stops, nothing is left half-done.
- Your history stays in Sage: by default DIANO brings balances on the start date. Keep Sage for a few months to look things up.

Move-day checklist

1. **Pick the start date**: the 1st of a month, just after a month is finished, when last month's VAT return (and payroll) is done.
2. **Finish Sage up to the day before**: capture everything, allocate receipts, payments and credit notes to their invoices.

3. **Export the files on move day**, not earlier, for the day before the start date.
4. **Check them:** your company name on each report, the trial balance totals the same, files end in .xlsx, .xls or .csv.
5. **Upload in Move to DIANO**, fix anything the checks show, and a Company Admin presses **Bring it across**.
6. **From the start date, capture new invoices and payments in DIANO only.** Stop capturing in Sage.
7. **Keep Sage for a few months** to look things up. Don't delete it.
8. **First month-end in DIANO**: compare DIANO's reports with Sage's closing figures, then lock the month.

What is different on purpose

- **Approvals:** some steps need a second person (new suppliers and their bank details, purchase orders, journals, expenses, supplier invoices, expense claims, payroll runs).
- **Issued means final:** documents are voided or credited with a reason, never edited or deleted. Numbers are never skipped or used twice.
- **Period locks:** a Company Admin locks each month; reopening needs a reason and is logged.
- **Audit trail:** who changed what, and when, for every change. Nobody can edit or delete it.
- **Roles:** each person sees only the screens their role allows.
- **In your browser:** on your phone, tablet or laptop.

Where to get help

- The Sage-to-DIANO cheat sheet (2 pages).
- The Help Centre: diano.co.za/help/app/ · the move guides: diano.co.za/help/move/
- In Move to DIANO, every problem has a button to send it to DIANO Support with the details.
- Help & Support › + New support request · info@diale.co.za · 087 265 3889