Your first day on DIANO

Set up your company in about an hour: sign in, turn on two-step sign-in, fill in your Company profile, add your people, and send your first quote and invoice.

Before you start, have these ready

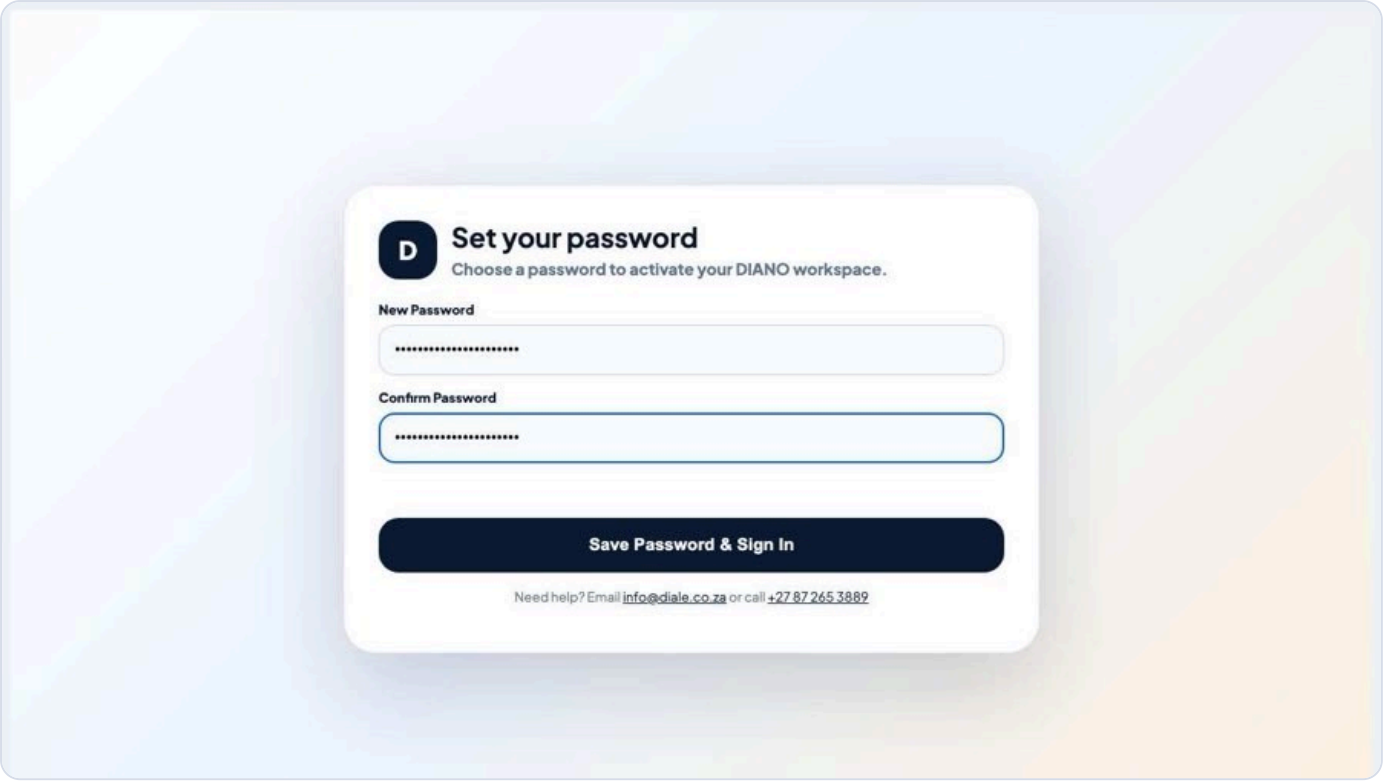
- The e-mail from DIANO with the link to set your password.
- Your phone, with an authenticator app (for example Google Authenticator or Microsoft Authenticator). It is free in the App Store or Google Play.
- Your company details: registered name, registration number, VAT number (if you are registered), address, phone, e-mail, and the bank account your customers pay into.
- Your logo as a picture file (PNG or JPG), if you have one.
- The names and e-mail addresses of the people who will work in DIANO with you.

In this guide

1. Set your password and sign in
2. Turn on two-step sign-in
3. Find your way around: Today and Getting started
4. Fill in your Company profile
5. Add your people
6. Add your first customer
7. Make your first quote
8. Turn the quote into an invoice
9. Print it or send it
10. Record the payment
11. DIANO on your phone

1. Set your password and sign in

1. Open the e-mail from DIANO and press the link. The link works for a short time only. If it has run out, ask DIANO Support for a new one.
2. Type a new password twice and press Save Password & Sign In.
3. Use a password you don't use anywhere else. A short sentence works well.

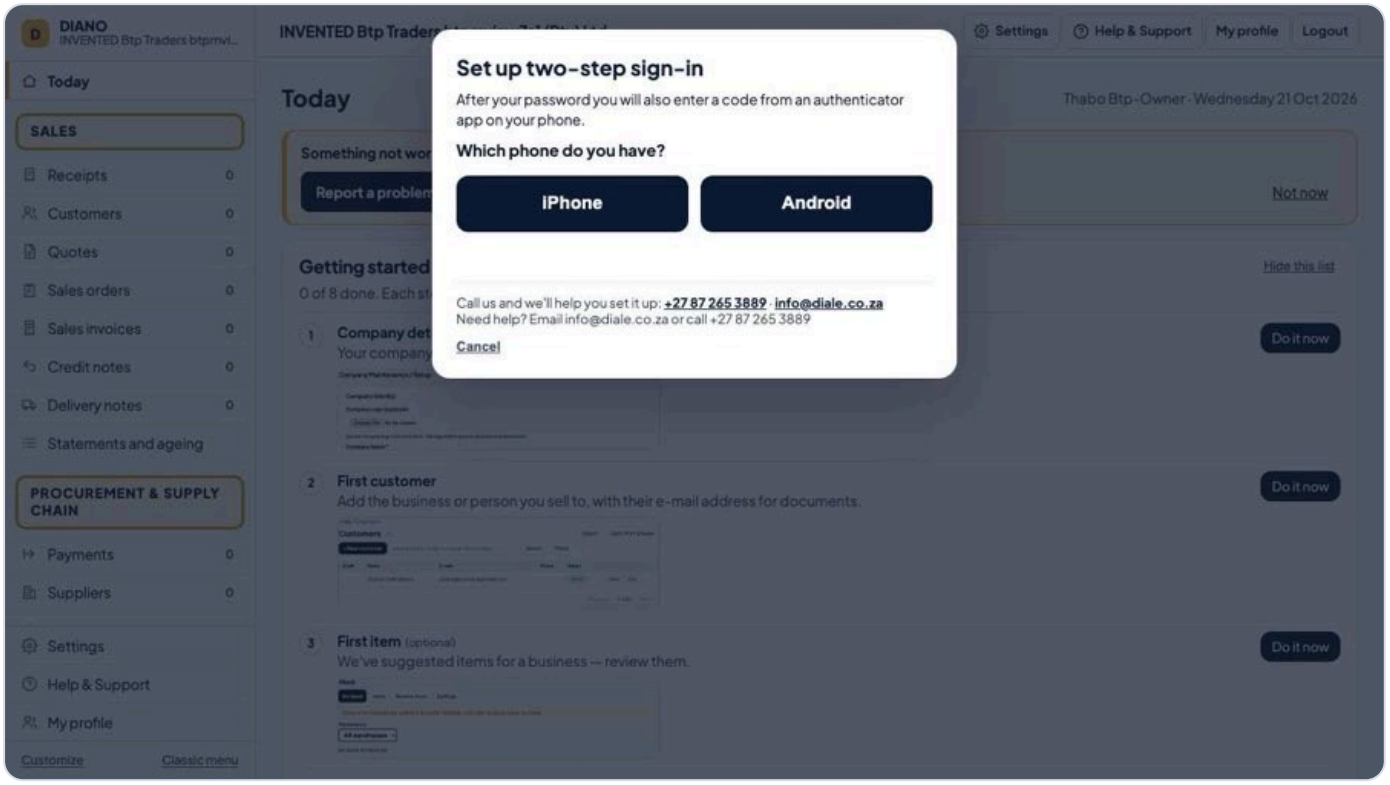


Set your password. (All screenshots show an INVENTED company.)

2. Turn on two-step sign-in

1. DIANO asks you to set up two-step sign-in. Choose iPhone or Android.
2. Install the authenticator app if you don't have it yet, open it and scan the square code DIANO shows.
3. Type the 6-digit code from the app into DIANO and press Turn on two-step sign-in.
4. DIANO shows your recovery codes. Press Copy or Download, keep them somewhere safe away from your phone, tick I have saved these codes and press Continue.
5. From now on you type a new code from the app each time you sign in.

> Lost your phone? When you sign in, press Lost your phone? Use a recovery code. This turns two-step sign-in off, so set it up again straight away on your new phone. No codes left? Contact DIANO Support.

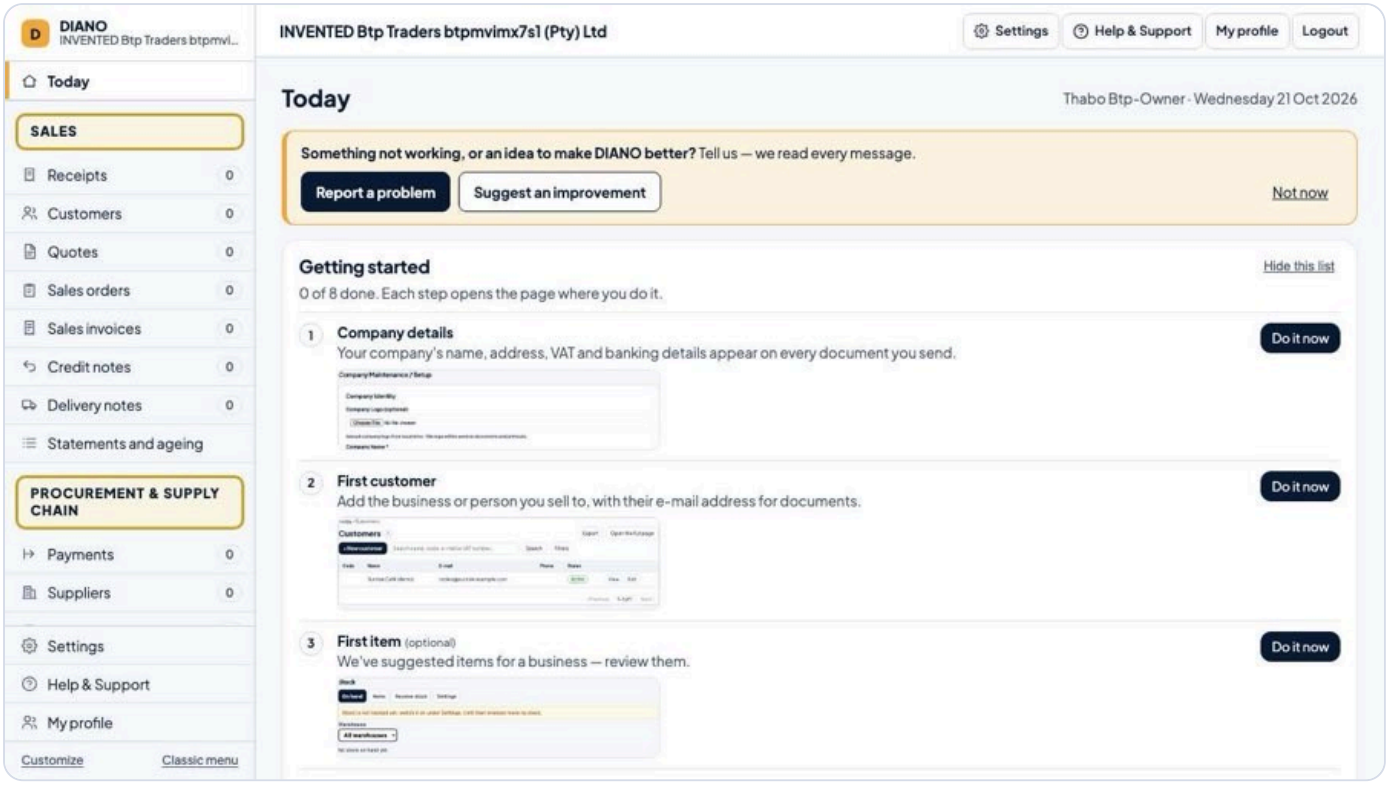


Setting up two-step sign-in.

More: Turn on two-step sign-in

3. Find your way around: Today and Getting started

1. After you sign in you land on Today. The menu on the left has the headings Sales, Procurement & Supply Chain, HR and Accounting (Reports is under Accounting), then Settings and Help & Support. On a phone, press Menu at the top.
2. The Getting started list on Today shows your first steps. Each step has a Do it now button that opens the right page.
3. Settings, Help & Support, My profile and Logout are at the top right.



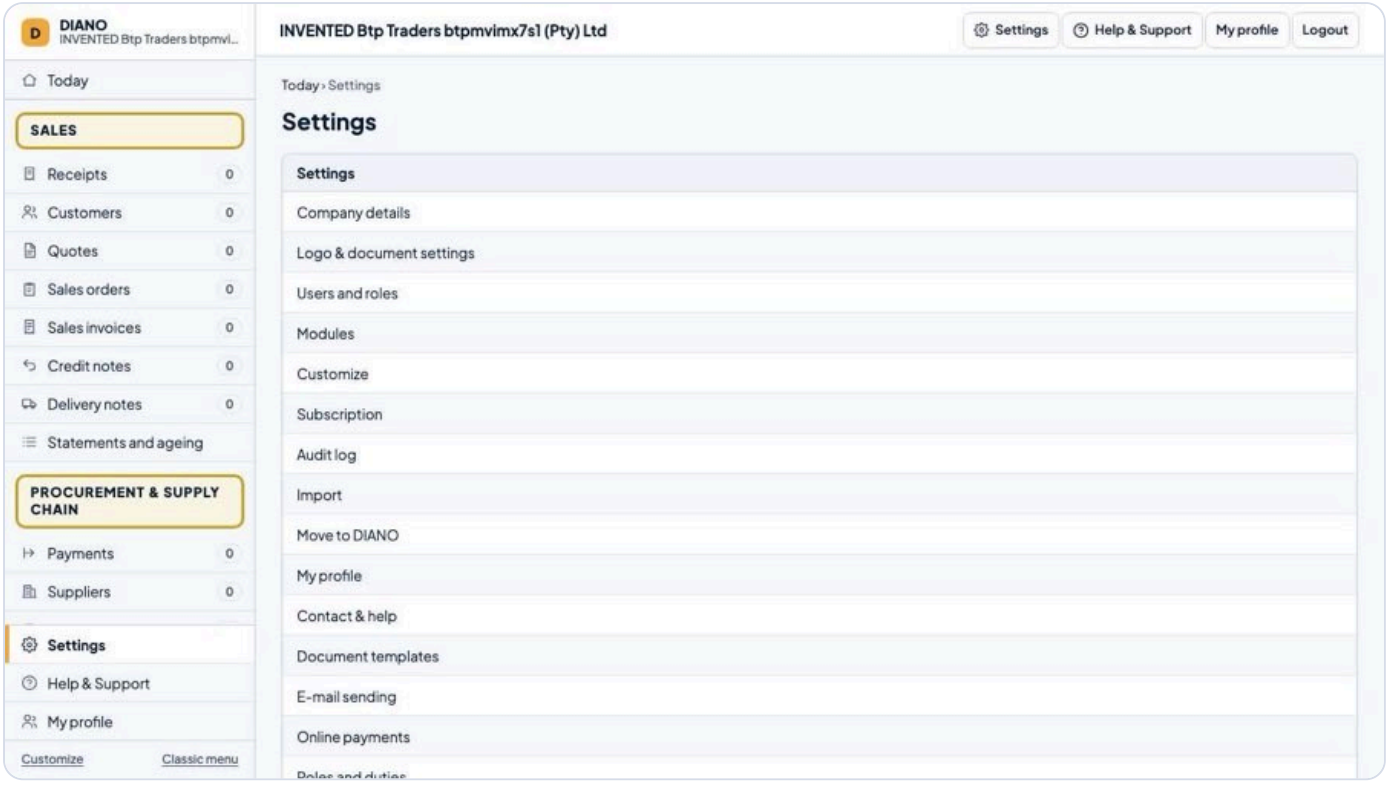
Today, with the Getting started list.

More: Getting started

4. Fill in your Company profile

1. Open Settings, then Company profile.
2. Logo and brand colour: choose your logo and a colour, then press Save logo and colour.
3. Business details: choose your company type (for example (Pty) Ltd or CC), and type the registered name, trading name (if different), registration number, VAT number (or tick Not VAT registered), income tax number and CSD supplier number. Press Save on the card.
4. Contact, addresses and banking: type them and save each card. The banking details print on your invoices.
5. Every quote, invoice and statement now shows these details.

> Name changing: until the next update, these details are on two pages, Company details and Logo & document settings. Only a Company Admin can change them.



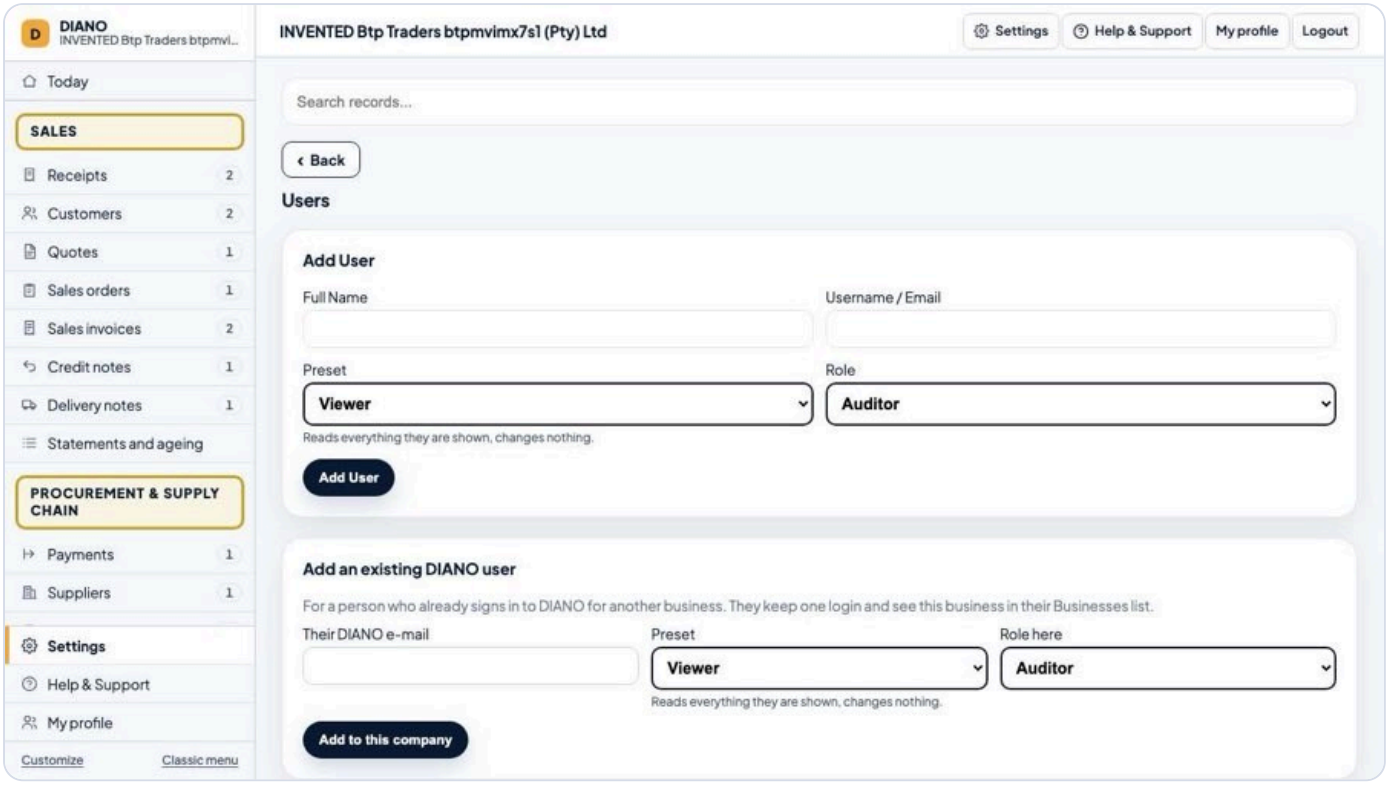
Settings today. After the next update Settings shows cards, and Company details and Logo & document settings become one page: Company profile.

More: Company profile

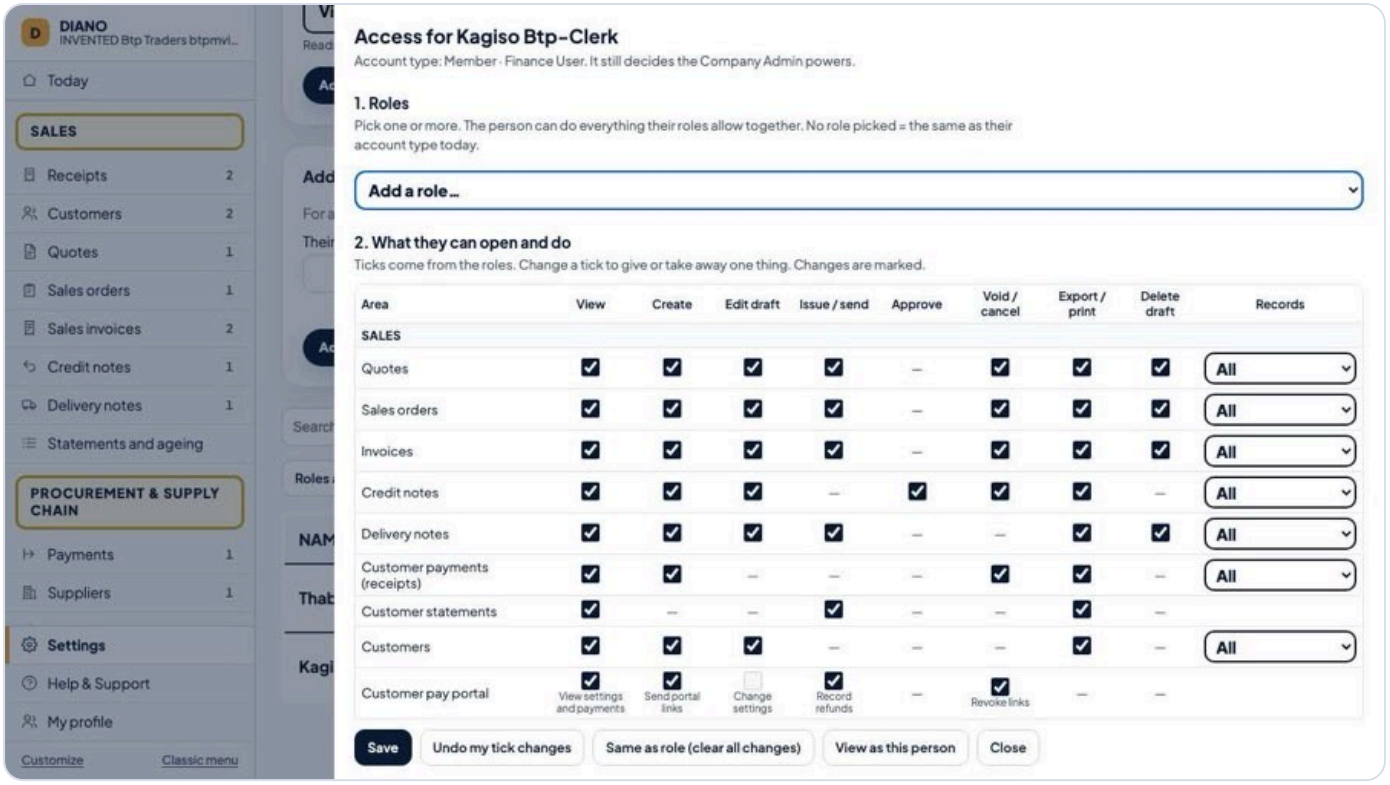
5. Add your people

1. Open Settings, then Users and access (until the next update it may say Users and roles).
2. Under Add User, type the person's full name and e-mail, choose a Preset and a Role, and press Add User. DIANO e-mails them a link to set their password.
3. To change exactly what someone may see and do, press ⋯ on their row, then Access. Tick or untick per area, or press View as this person to check what they will see. Press Save.
4. Give each person only what they need. A second person checks and approves money matters where your settings ask for it.

> Access per person and View as this person arrive with a coming update. Until then, the Role decides what a person can do.



Users: add a person with a preset and a role.

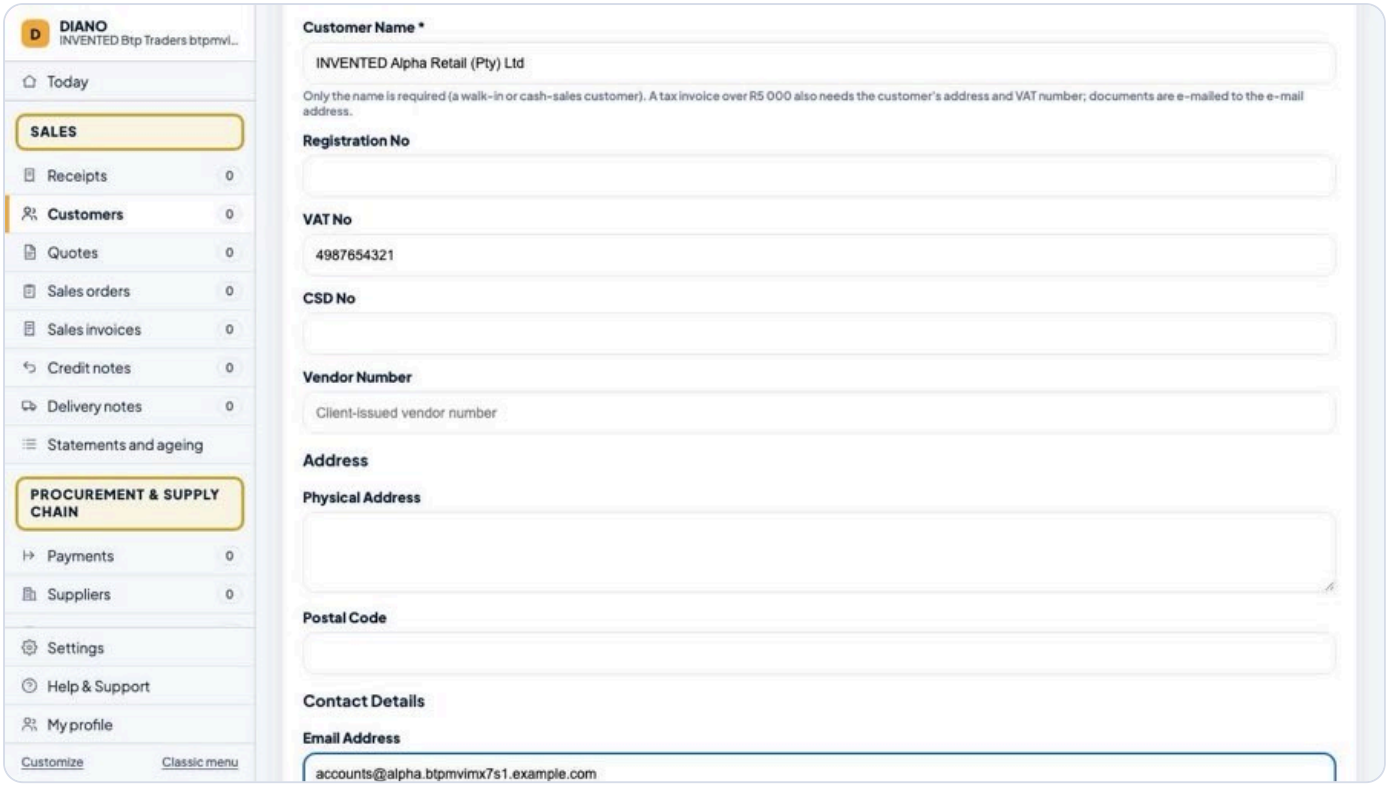


Access for one person: what they can open and do, area by area.

More: Users and access

6. Add your first customer

1. Open Sales, then Customers, and press + New customer.
2. Type the customer's name (the only field you must fill in), their e-mail for documents, and their VAT number, or tick Not VAT registered. Press Save.

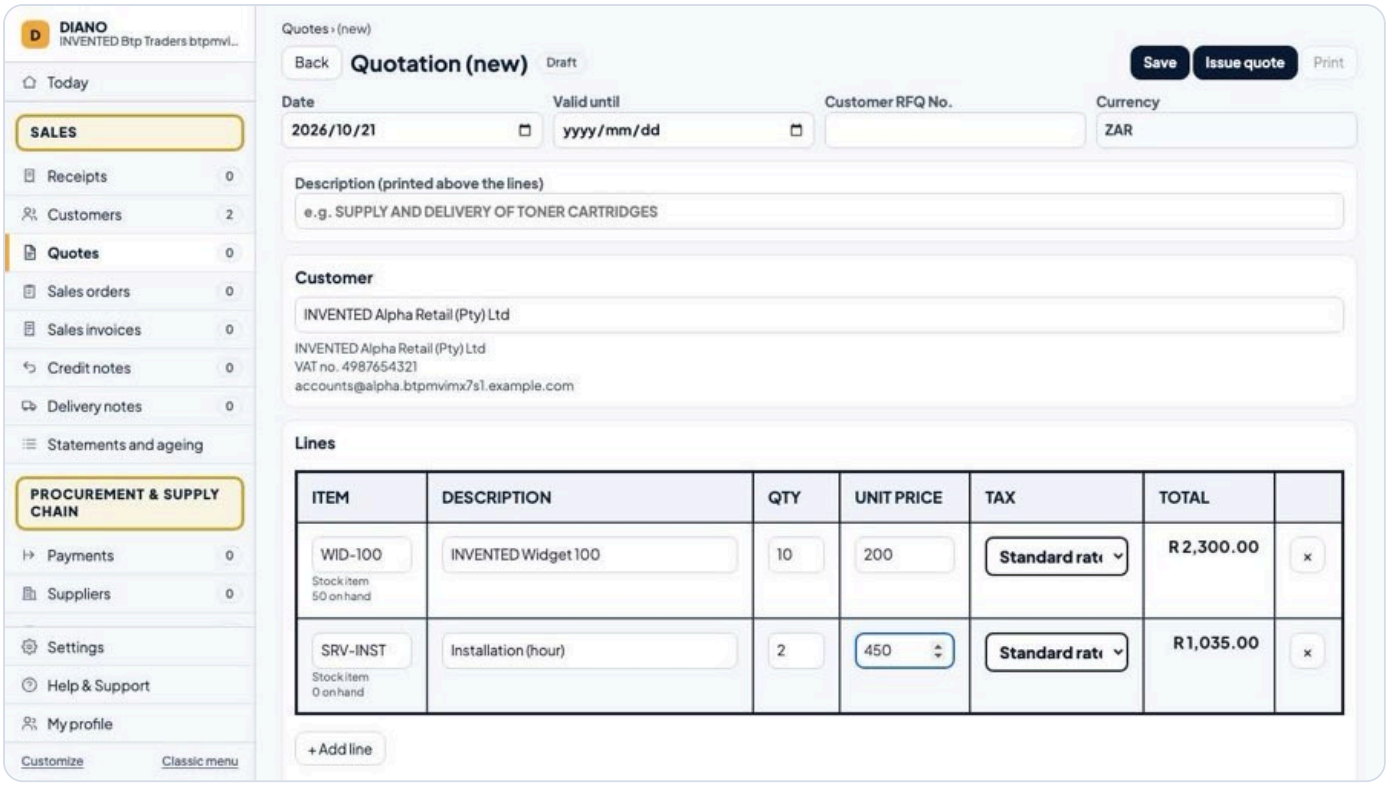


A new customer.

More: Add a customer

7. Make your first quote

1. Open Sales, then Quotes, and press + New quote.
2. Choose the customer, the date and Valid until.
3. Add each line with + Add line: the item or a description, the quantity and the unit price. DIANO works out the VAT and the total.
4. Press Save, then Issue quote. The quote gets its number.

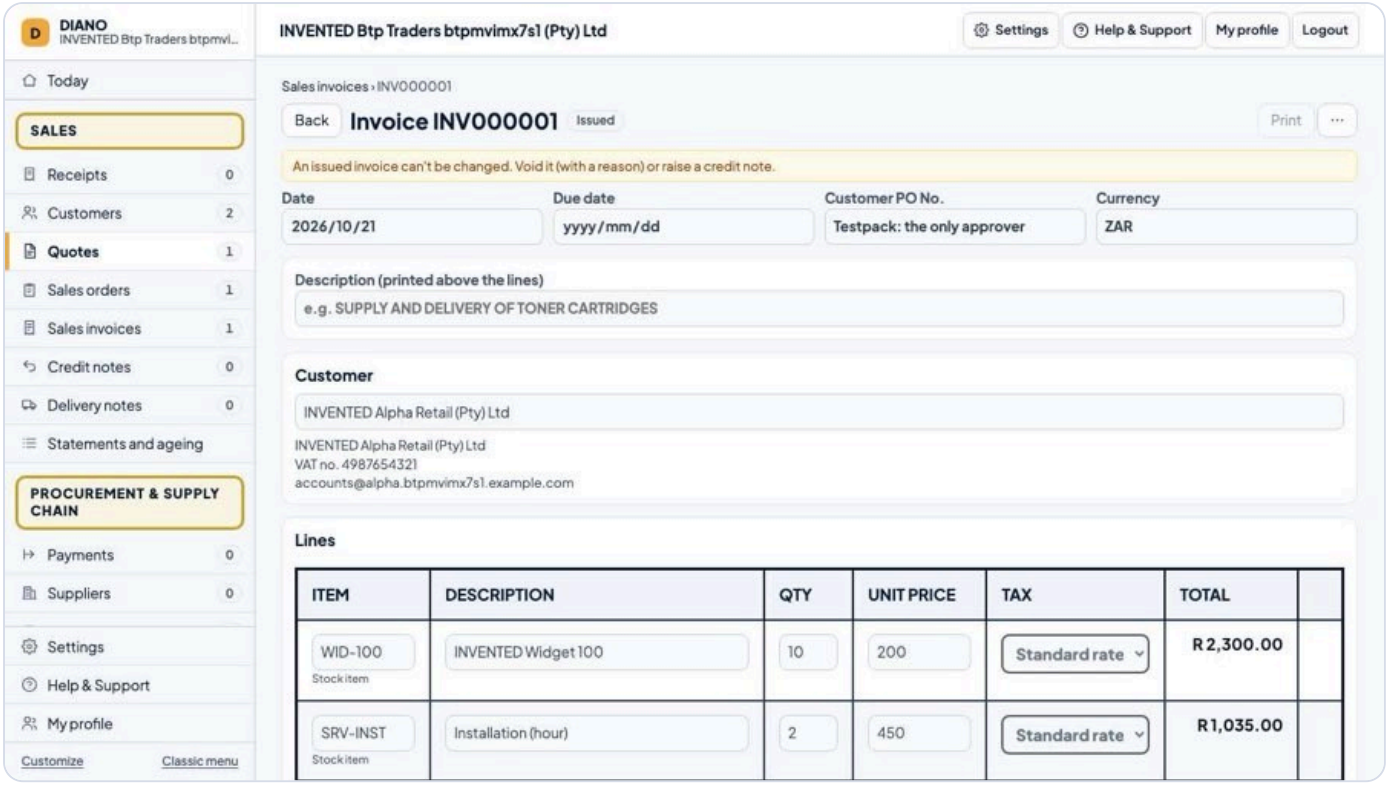


A quote with two lines.

More: Make a quote and turn it into an invoice

8. Turn the quote into an invoice

1. When the customer accepts, open the quote, press the ⋯ button, then Create invoice.
2. Check the invoice and press Save. It is a Draft: you can still change it.
3. Press Issue. The invoice gets its number. After that it can't be changed: you void it (with a reason) or raise a credit note.



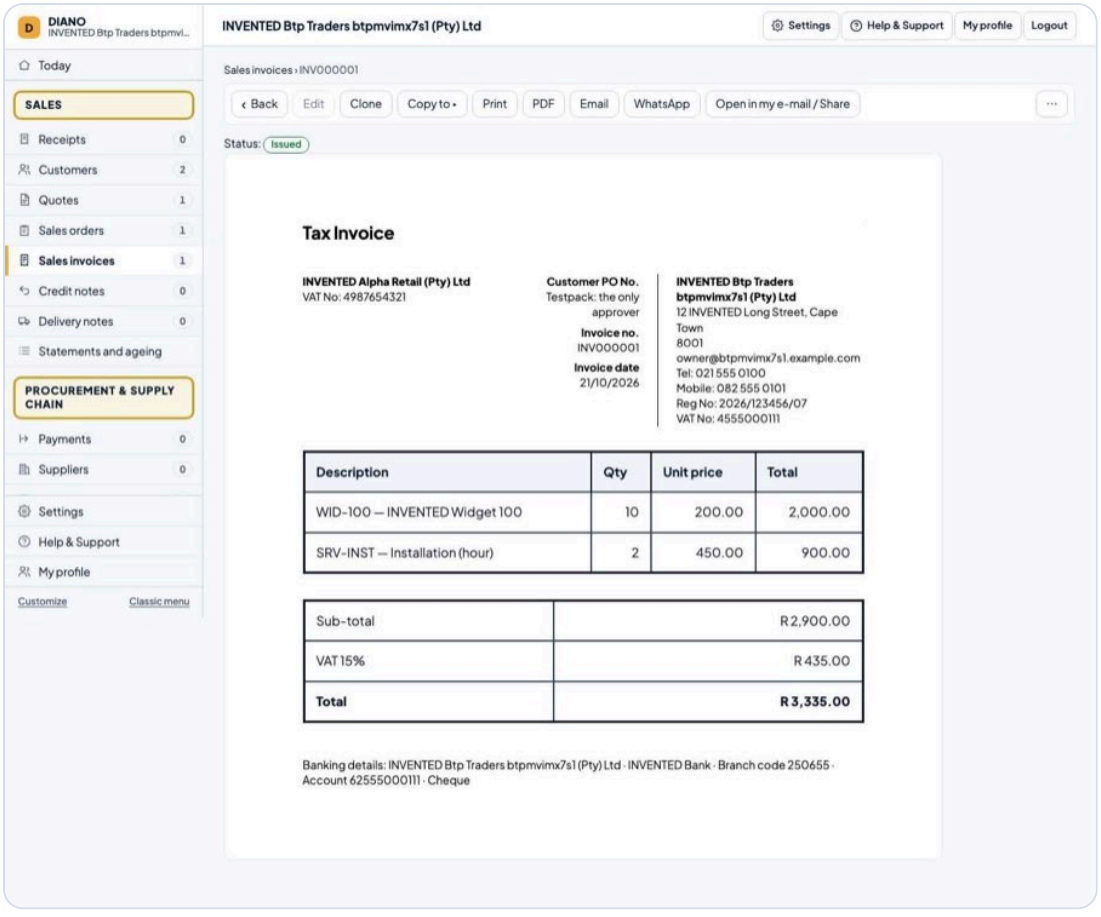
An issued invoice: it can't be changed any more.

More: Create and issue a sales invoice

9. Print it or send it

1. Open the issued invoice. Use the buttons at the top: Print, PDF, or Open in my e-mail / Share.
2. PDF saves the invoice to your computer or phone. Open in my e-mail / Share starts an e-mail in your own e-mail program, from your own address.
3. Print opens your printer's window straight away.

> DIANO never sends your documents from a DIANO address. They always go from your own address, so your customers see your business.

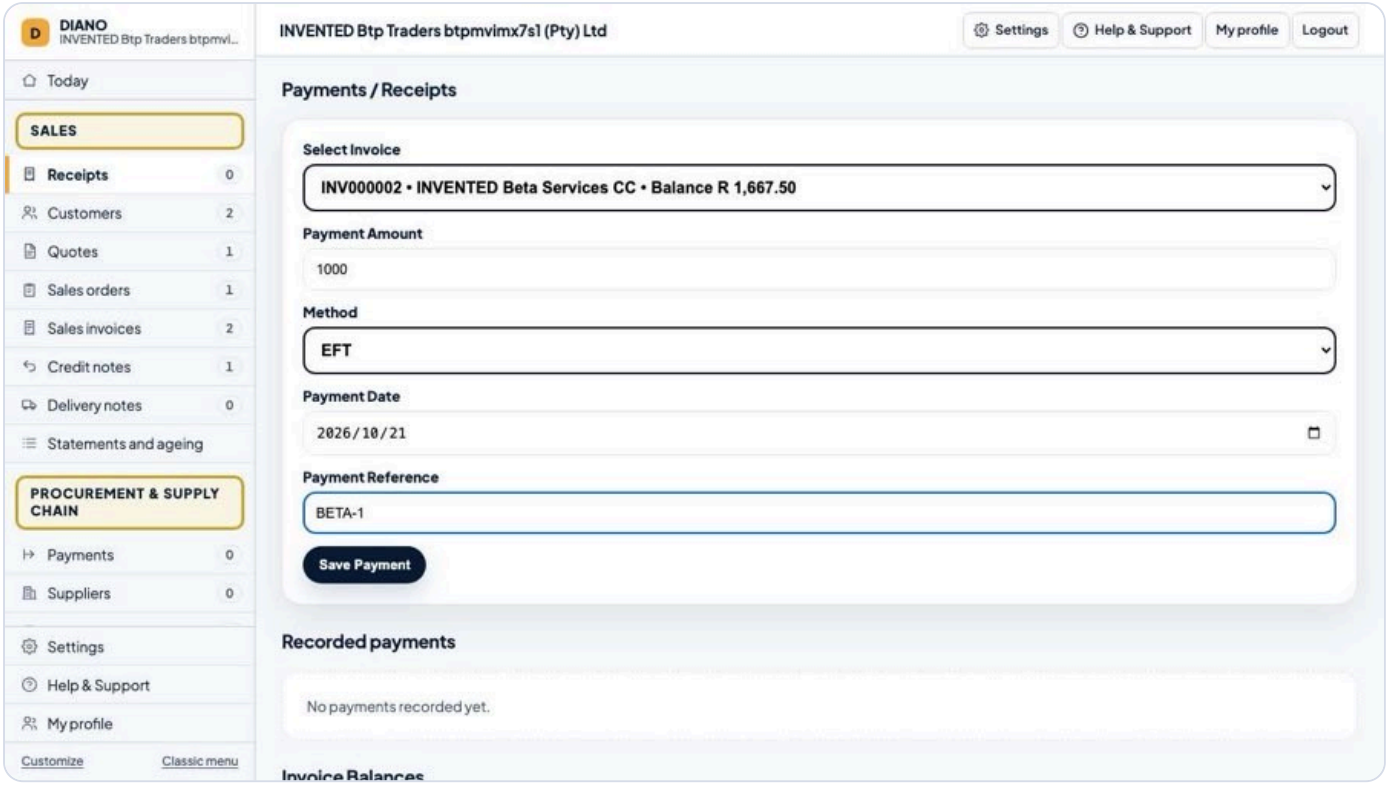


The invoice and its buttons.

More: Print, PDF and Share

10. Record the payment

1. When the customer pays, open Sales, then Receipts.
2. Choose the invoice. Check the amount, the method (for example EFT), the date and the reference.
3. Press Save Payment. The invoice shows Paid or Partially Paid.

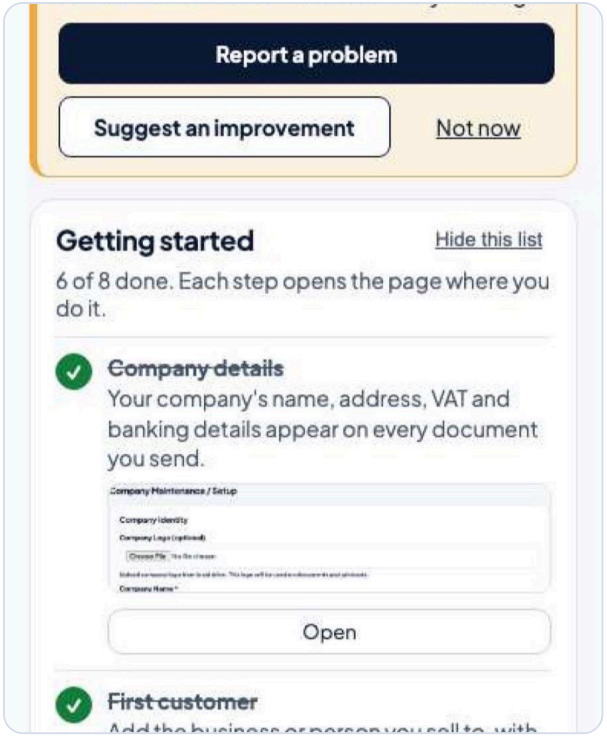


Recording a customer payment.

More: Record a customer payment

11. DIANO on your phone

1. DIANO works in the browser on your phone. Sign in the same way.
2. Press Menu at the top to open the menu.



Today on a phone.

Done? Check these off

- □ You signed in and turned on two-step sign-in.
- □ Your Company profile is filled in, with your logo.
- □ Your people are added with the right access.
- □ Your first customer, quote, invoice and receipt are in DIANO.

Stuck?

Search the Help Centre (in DIANO: Help & Support, then Open the Help Centre), or open Help & Support in DIANO and press + New support request. Say which step of this guide you are on.

DIANO · Your first day on DIANO · checked 22 October 2026 · the screenshots show an INVENTED company