

Management of invoices and receipts plays a crucial role for any organization. An invoice is a document that indicates the goods/services that a company has provided to a customer. Invoices also itemize the goods or services sold and may include discounts, taxes, and other fees. A receipt is a document that proves that a customer has paid for the goods/services that they have received. Gridlex Sky allows users to manage their invoices and business receipts in a single place. It can help businesses to record all their sales and receipts.

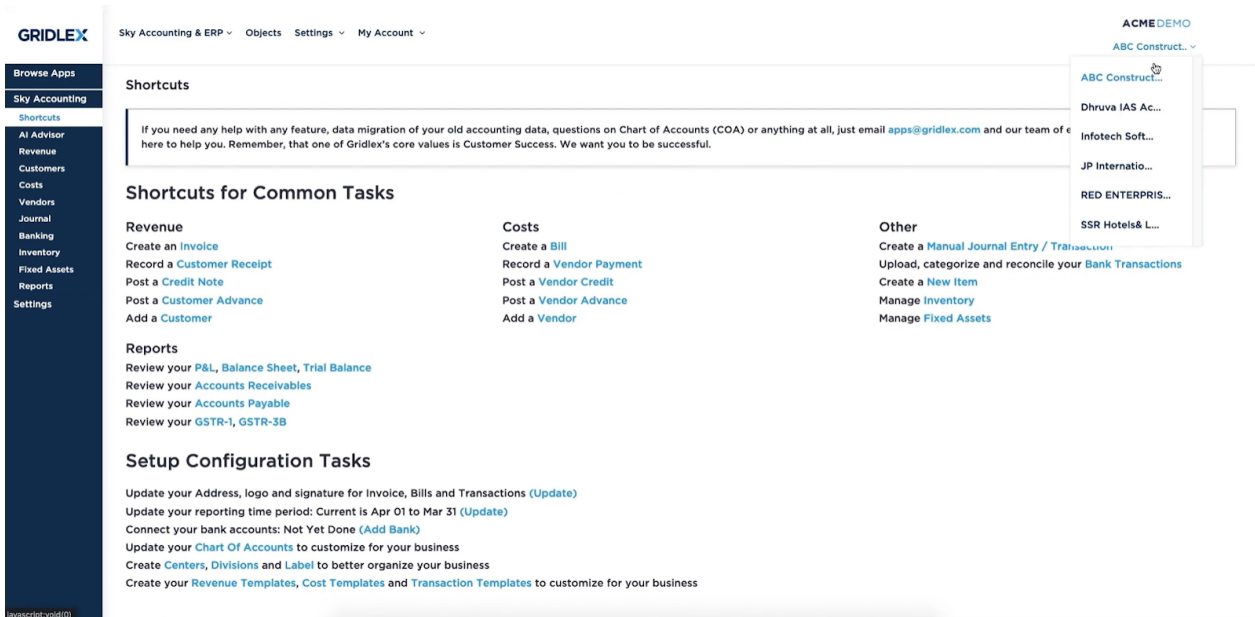
Gridlex Sky accounting software is a powerful tool that allows you to easily create and manage invoices and receipts. In this user manual, we will provide step-by-step instructions on how to use the software to create and manage your invoices and receipts.

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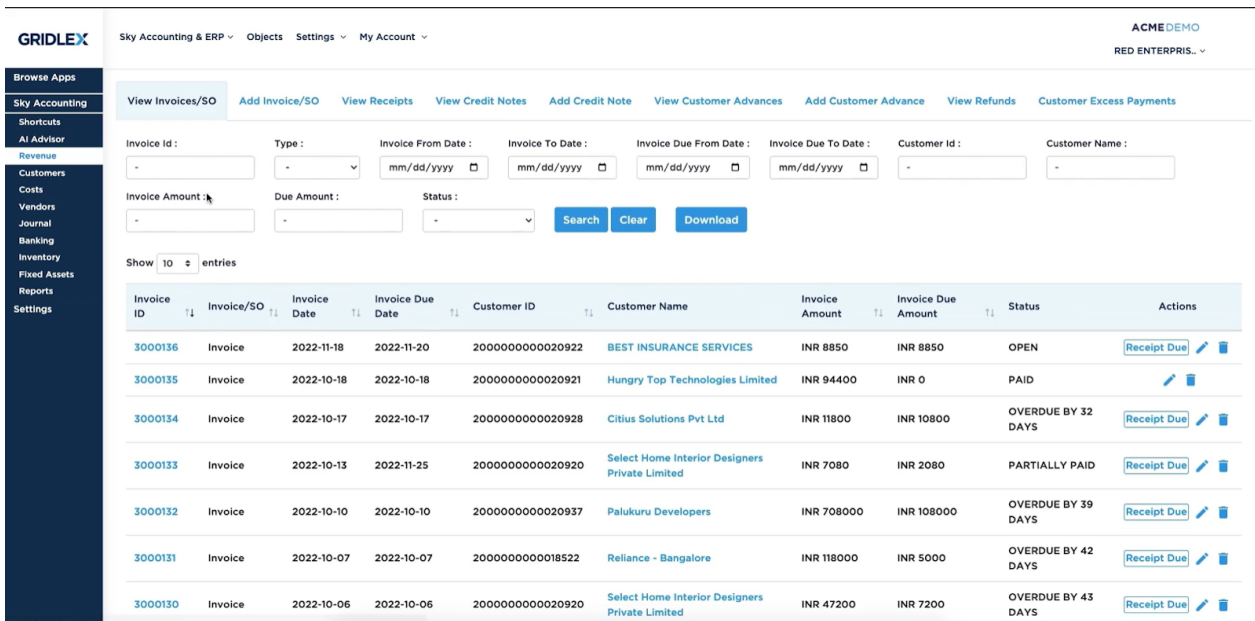
If you need any help with any feature, data migration of your old accounting data, questions on Chart of Accounts (COA) or anything at all, just email [apps@gridlex.com](mailto:apps@gridlex.com), and our team of expert accountants will be here to help you. Remember, that one of Gridlex's core values is Customer Success. We want you to be successful.

## How to Create Invoices and Receipts in Gridlex Sky?

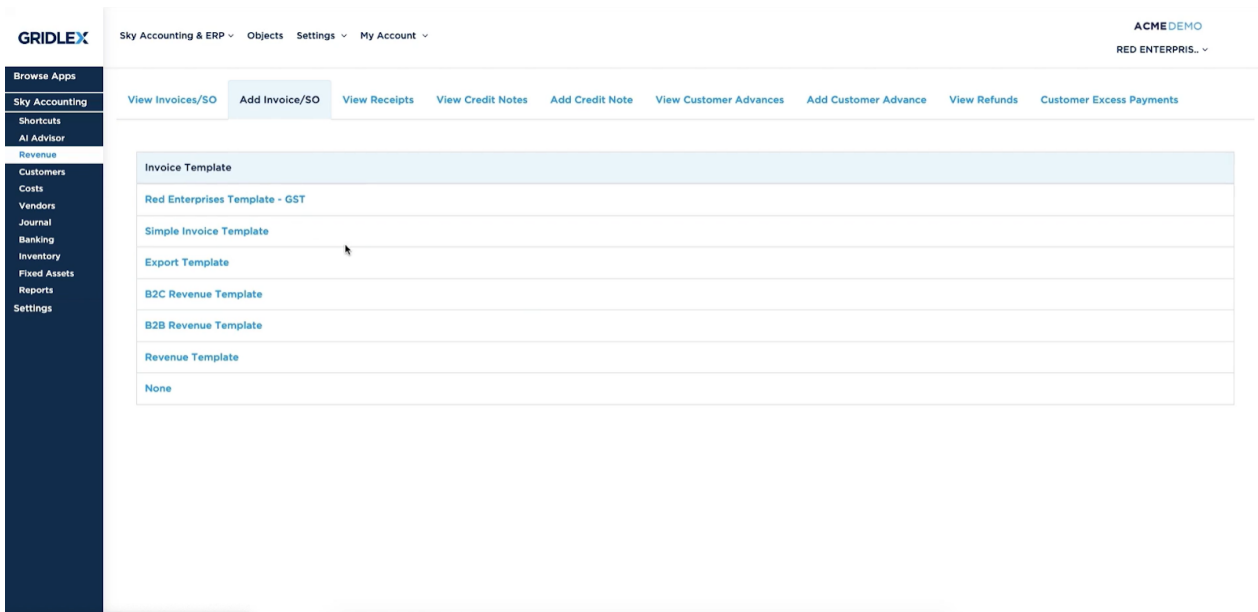
**Step 1:** Login into your Gridlex App Suite Account and choose the entity of your choice where you want to create and manage your invoices and receipts.



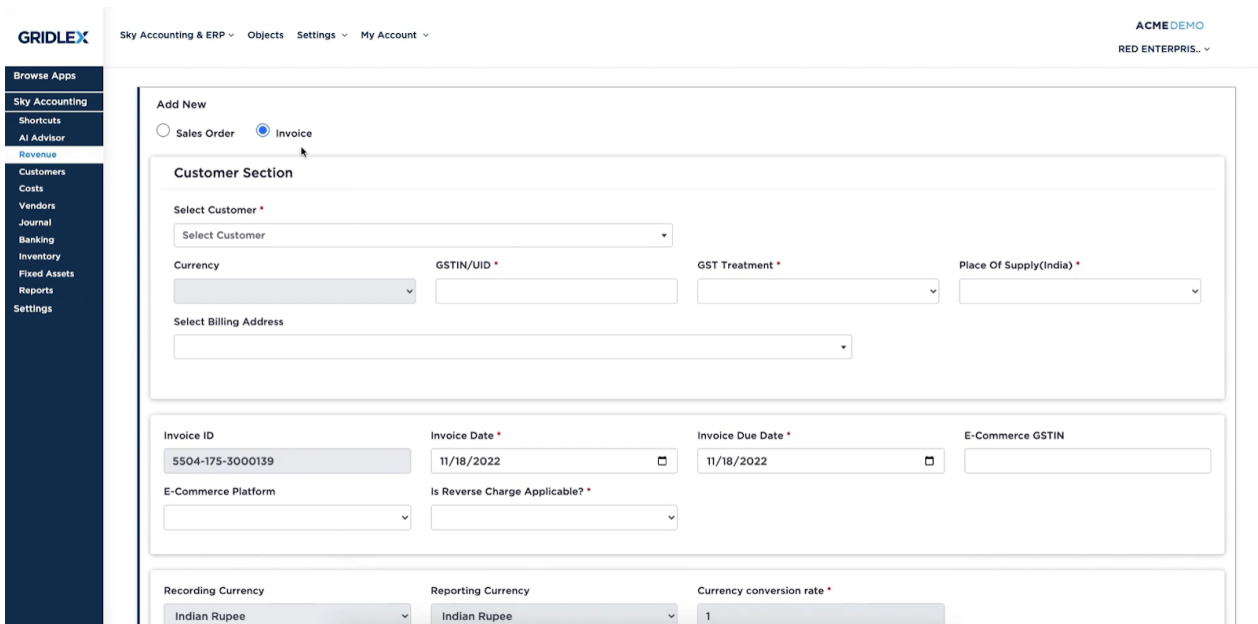
**Step 2:** Click on the "Revenue" tab in the left navigation menu. Click on the "Add Invoice/SO" button at the top of the screen.



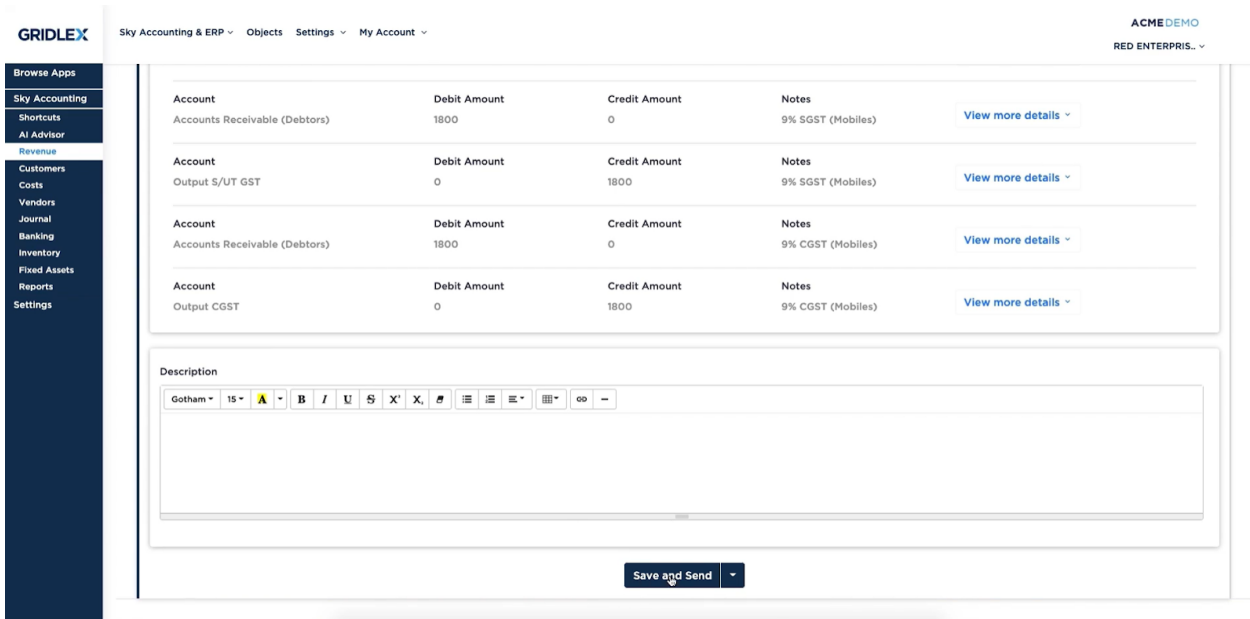
**Step 3:** Here, you can view different types of invoice templates. Click on the invoice template of your choice.



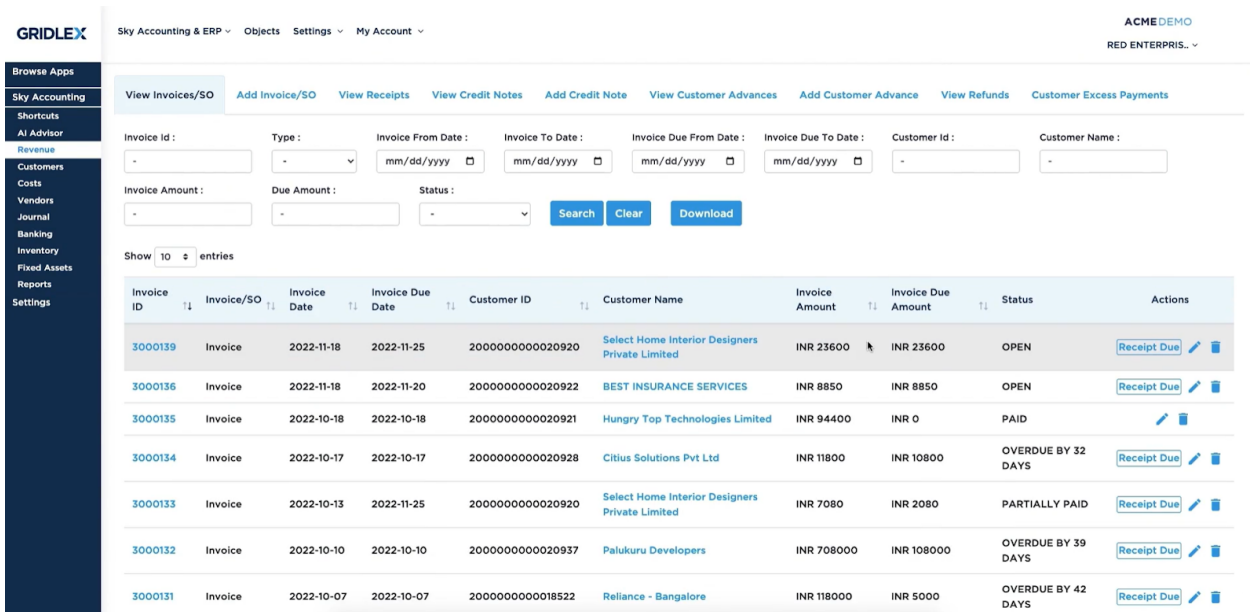
**Step 4:** Enter the necessary information for the invoice, including the customer's name, invoice date and invoice due date, the items or services being invoiced, the price for each item, and add a discount if applicable.



**Step 5:** Once you have entered all of the necessary information, click on the "Save" button to save the invoice. Users also have the option to "Save and Print" or "Save and Send Later."



**Step 6:** Voila! You have created a new invoice in Gridlex Sky. To manage your invoices, click on the "View Invoices" tab in the top navigation menu. Furthermore, users can select the "Receipt due" option to view the receipt. In addition, users can use the filters and search bar at the top of the screen to quickly find the invoice they are looking for.



**Step 7:** To manage your receipts, click on the "View Receipts" tab in the top navigation menu. This will open a list of all of your receipts. You can use the filters and search bar at the top of the screen to quickly find the receipt you are looking for. To view a receipt, simply click on its row in the table. To edit

a receipt, click on the "Edit" button. This will allow you to make any necessary changes to the receipt.

Receipt ID	Invoice ID	Invoice Date	Invoice Due Date	Customer ID	Customer Name	Receipt Date	Receipt Mode	Receipt Amount	Action
103879	5504-175-3000139	2022-11-18	2022-11-25	2000000000020920	Select Home Interior Designers Private Limited	November 18, 2022	Cash	INR 23600	
103872	5504-175-3000135	2022-10-18	2022-10-18	2000000000020921	Hungry Top Technologies Limited	November 18, 2022	Bank Transfer	INR 34400	
103769	5504-175-3000131	2022-10-07	2022-10-07	2000000000018522	Reliance - Bangalore	October 7, 2022	Bank Transfer	INR 85000	
103768	5504-175-3000135	2022-10-18	2022-10-18	2000000000020921	Hungry Top Technologies Limited	October 18, 2022	Bank Transfer	INR 60000	
103759	5504-175-3000131	2022-10-07	2022-10-07	2000000000018522	Reliance - Bangalore	October 7, 2022		INR 8000	
103758	5504-175-3000133	2022-10-13	2022-11-25	2000000000020920	Select Home Interior Designers Private Limited	October 13, 2022	Bank Transfer	INR 5000	
103741	5504-175-3000131	2022-10-07	2022-10-07	2000000000018522	Reliance - Bangalore	October 12, 2022	Bank Transfer	INR 20000	

With the Gridlex Sky accounting software, creating and managing invoices & receipts is quick and easy. By following the steps outlined in this user manual, you will be able to efficiently manage your invoicing and payment processes.

## Quick Tip

Gridlex Sky offers a list of shortcuts for common tasks. Users can click on the "Create an invoice" tab in order to go directly to the Revenue page without having to scroll down and click on other sections.

Browse Apps

Sky Accounting

Shortcuts

AI Advisor

Revenue

Customers

Costs

Vendors

Journal

Banking

Inventory

Fixed Assets

Reports

Settings

## Shortcuts for Common Tasks

### Revenue

- Create an [Invoice](#)
- Record a [Customer Receipt](#)
- Post a [Credit Note](#)
- Post a [Customer Advance](#)
- Add a [Customer](#)

### Costs

- Create a [Bill](#)
- Record a [Vendor Payment](#)
- Post a [Vendor Credit](#)
- Post a [Vendor Advance](#)
- Add a [Vendor](#)

### Other

- Create a [Manual Journal Entry / Transaction](#)
- Upload, categorize and reconcile your [Bank Transactions](#)
- Create a [New Item](#)
- Manage [Inventory](#)
- Manage [Fixed Assets](#)

### Reports

- Review your [P&L, Balance Sheet, Trial Balance](#)
- Review your [Accounts Receivables](#)
- Review your [Accounts Payable](#)
- Review your [GSTR-1, GSTR-3B](#)

## Setup Configuration Tasks

- Update your Address, logo and signature for Invoice, Bills and Transactions ([Update](#))
- Update your reporting time period: Current is Jan 01 to Dec 31 ([Update](#))
- Connect your bank accounts: Not Yet Done ([Add Bank](#))
- Update your [Chart Of Accounts](#) to customize for your business
- Create [Centers, Divisions](#) and [Label](#) to better organize your business
- Create your [Revenue Templates](#), [Cost Templates](#) and [Transaction Templates](#) to customize for your business