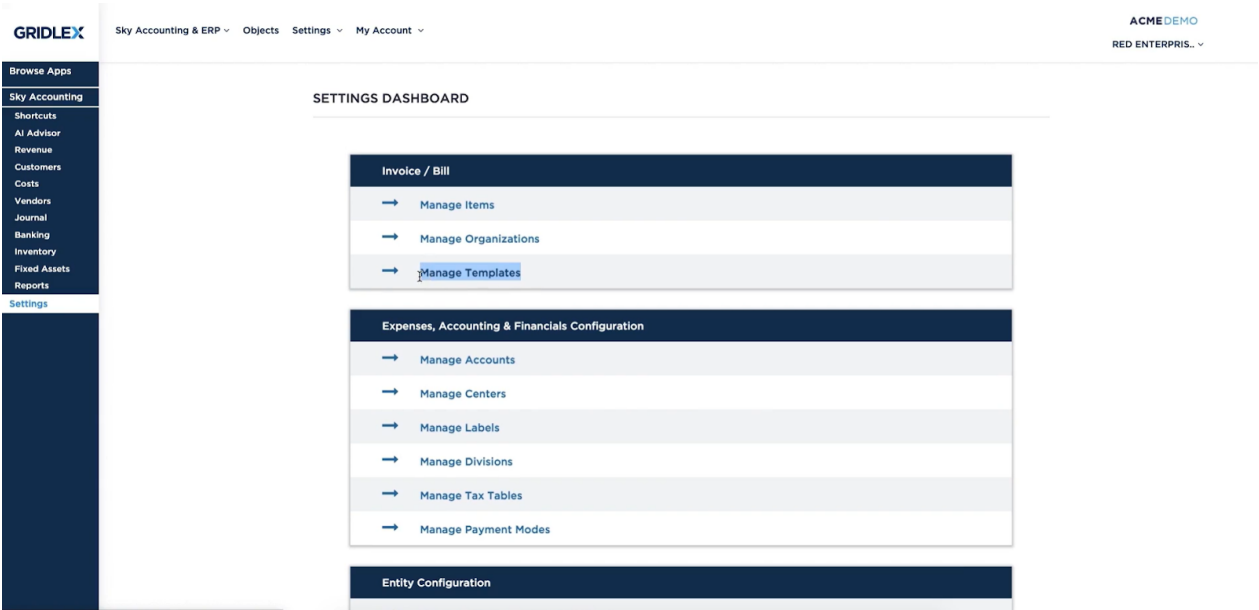


Gridlex Sky enables users to create custom templates for their company's revenue, cost, and transaction reports. With the help of Gridlex Sky, users can customize the appearance of various sales, purchase and transaction templates as per their business requirements. This can be done by utilizing the pre-loaded templates provided by Gridlex Sky or by creating a brand new one that fits your business needs. In order to do that, users have to identify the specific fields that need to be included in the template.

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 aps@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 Customize Revenue/Cost/Transaction Templates in Gridlex Sky?

Step 1: Login into your Gridlex App Suite Account and choose the entity of your choice. Go to the “Settings” menu and select the “Manage Templates” tab.



Step 2: Here, you can view all the past revenue templates you have created.

The screenshot shows the 'View Revenue Templates' page in the GRIDLEX Sky Accounting & ERP system. The page has a sidebar with navigation options like 'Browse Apps', 'Sky Accounting', 'Shortcuts', 'AI Advisor', 'Revenue', 'Customers', 'Costs', 'Vendors', 'Journal', 'Banking', 'Inventory', 'Fixed Assets', 'Reports', and 'Settings'. The main content area shows a table of revenue templates.

Template	Template Types	Action
Red Enterprises Template - GST	Credit Note, Customer Advances, Invoice	Edit
Simple Invoice Template	Credit Note, Customer Advances, Invoice	Edit
Export Template	Credit Note, Customer Advances, Invoice	Edit
B2C Revenue Template	Credit Note, Customer Advances, Invoice	Edit
B2B Revenue Template	Credit Note, Customer Advances, Invoice	Edit
Revenue Template	Credit Note, Customer Advances, Invoice	Edit
None	Credit Note, Customer Advances, Invoice	Edit

Step 3: To create or edit a new revenue template, click on “Add/Edit Revenue Template”. Here, add your template name and select template type i.e, Invoice, Credit Note, Customer Advances. Users can also add custom objects (if any).

The screenshot shows the 'Add/Edit Revenue Template' page in the GRIDLEX Sky Accounting & ERP system. The page includes fields for 'Template Name', 'Select Template Type', 'Custom Objects', and 'Template Section' configuration.

Template Name *
 Red Enterprises Template - GST

Select Template Type *
☒ Invoice ☐ Credit Note ☐ Customer Advances

Custom Objects
 Add Custom Objects: [Add](#)

Template Section

Show Transaction Currency Conversion Details? ☒ Yes ☐ No

Show Item Amounts in which formats?

Print Due Date? ☒ Yes ☐ No

Choose Standard Fields to Show:

Standard Field Name	Standard Field Type	Show	Is Required	Print	Order
Aadhar Number	Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
affiliated_dexur_entity_id1	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Step 4: In the Template Section, add standard Fields/Custom fields (if any) related to entity business & set configuration of Show/ Is required/ Print/

Order. Fill in other fields like show transaction currency details (Yes/No) as per business requirements. In addition, select the formats of amount i.e. Recording Currency/ Recording & Reporting Currency.

GRIDLEX

Sky Accounting & ERP ▾ Objects ▾ Settings ▾ My Account ▾

ACMEDEMO

RED ENTERPRIS.. ▾

Browse Apps

Sky Accounting

Shortcuts

AI Advisor

Revenue

Customers

Costs

Vendors

Journal

Banking

Inventory

Fixed Assets

Reports

Settings

Template Section ▾

Show Transaction Currency Conversion Details? ☒ Yes ☐ No

Show Item Amounts in which formats? Recording Currency ▾

Print Due Date? ☒ Yes ☐ No

Choose Standard Fields to Show:

Standard Field Name	Standard Field Type	Show	Is Required	Print	Order
Aadhar Number	Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
affiliated_dexur_entity_id1	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
affiliated_dexur_entity_id1_1719	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
affiliated_dexur_entity_id2	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
affiliated_dexur_entity_id2_1719	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

(3 of 83 selected)

Choose Custom Fields to Show:

Field Name	Field Type	Show	Is Required	Print	Order
HRA Services	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Allocated Manager	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Budget Cost	Float	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Step 5: In the Organization Section, choose the organization address type & set configuration of Show/ Is required/ Print /Order. Fill in standard Fields/ Custom fields & set configuration of Show/ Is required/ Print /Order. Here, users are required to create custom fields from Master Data Management (MDM) & need to map those fields in the invoice template.

GRIDLEX

Sky Accounting & ERP ▾ Objects ▾ Settings ▾ My Account ▾

ACMEDEMO

RED ENTERPRIS.. ▾

Browse Apps

Sky Accounting

Shortcuts

AI Advisor

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Settings

Organization Section ▾

Choose Organization Addresses to Show: *

Address Type	Show	Is Required	Print
Billing 0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Mailing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service / Place of Supply	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shipping	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(1 of 5 selected)

Choose Standard Fields to Show:

Standard Field Name	Standard Field Type	Show	Is Required	Is Editable	Print	Order
Contact No	Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Customer Tax Preference	Dropdown	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Customer Type	Dropdown	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Email	Text	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
GSTIN/UID	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1

(3 of 8 selected)

Choose Custom Fields to Show:

GRIDLEX

Sky Accounting & ERP ▾ Objects Settings ▾ My Account ▾

ACMEDEMO
RED ENTERPRIS.. ▾

Browse Apps

Sky Accounting

Shortcuts

AI Advisor

Revenue

Customers

Costs

Vendors

Journal

Banking

Inventory

Fixed Assets

Reports

Settings

Item Section ▾

Item display Name

Item

Quantity display Name

Quantity

Unit Price display Name

Price Per Unit

Show discount?

☒ Yes ☐ No

Show Centers?

☐ Yes ☒ No

Show Divisions?

☐ Yes ☒ No

Show Labels?

☐ Yes ☒ No

Show Accounts?

☐ Yes ☒ No

Expand Centers, Divisions, Labels, Accounts by default?

☐ Yes ☒ No

Show Items in which View?

Block ▾

Choose Standard Fields to Show:

Standard Field Name	Standard Field Type	Show	Is Required	Is Editable	Print	Order
HSN/SAC Code	Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1 <input type="text"/>
ITC Eligibility	Dropdown	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Item Tax Preference	Dropdown	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

(1 of 3 selected)

Choose Custom Fields to Show:

GRIDLEX

Sky Accounting & ERP
Objects
Settings
My Account

ACME DEMO
RED ENTERPRIS..

Browse Apps
Sky Accounting
Shortcuts
AI Advisor
Revenue
Customers
Costs
Vendors
Journal
Banking
Inventory
Fixed Assets
Reports
Settings

Miscellaneous Section

Use Rich Text Editor? ☒ Yes ☐ No

Choose Standard Fields to Show:

Standard Field Name	Standard Field Type	Show	Print	Order
affiliated_dexur_entity_id1	Text	<input type="checkbox"/>	<input type="checkbox"/>	
affiliated_dexur_entity_id1_1719	Text	<input type="checkbox"/>	<input type="checkbox"/>	
affiliated_dexur_entity_id2	Text	<input type="checkbox"/>	<input type="checkbox"/>	
affiliated_dexur_entity_id2_1719	Text	<input type="checkbox"/>	<input type="checkbox"/>	
affiliated_dexur_entity_id3	Text	<input type="checkbox"/>	<input type="checkbox"/>	

(1 of 49 selected)

Description

Gotham 15
B I U S X' X.

Step 8: In Theme Setting Section, change the tiles of Invoice/bill, Sales/ Purchase order, Customer/Vendor advances, Receipts Title, etc as per enterprise names. Choose the theme of your choice for printing.

GRIDLEX Sky Accounting & ERP ▾ Objects Settings ▾ My Account ▾ ACMEDEMO
RED ENTERPRIS. ▾

Theme Settings ▾

Choose titles to show while printing *

Invoices Title: Sales Orders Title: Receipts Title:

Credit Notes Title: Customer Advances Title:

Choose theme for printing Invoice, Credit Note, Customer Advances *

Standard

Modern

Modern With Header

Construction

Choose theme for printing Invoice, Credit Note, Customer Advances Payment *

Step 9: Fill Entity address, Entity logo and Signature file. Update/Save it once done with the settings.

GRIDLEX Sky Accounting & ERP ▾ Objects Settings ▾ My Account ▾ ACMEDEMO
RED ENTERPRIS. ▾

Entity Address/Details Invoice, Credit Note, Customer Advances

Entity Logo

Choose image file... Red Enterprises Remove Image

Signature

Choose image file... Signature Remove Image

☒ Include in print

Water Mark Image
(Please upload the image with transparent background)None

Choose image file...

Step 10: You have successfully created/edited the revenue template. The same procedure is repeated for the cost and transaction templates as well. To view all the cost templates, click on “View Costs Templates”.

The screenshot shows the GRIDLEX Sky Accounting & ERP interface. The top navigation bar includes 'Sky Accounting & ERP', 'Objects', 'Settings', and 'My Account'. The right side shows 'ACMEDEMO' and 'RED ENTERPRIS...'. The left sidebar lists various modules: 'Browse Apps', 'Sky Accounting', 'Shortcuts', 'AI Advisor', 'Revenue', 'Customers', 'Costs', 'Vendors', 'Journal', 'Banking', 'Inventory', 'Fixed Assets', 'Reports', and 'Settings'. The main content area has tabs for 'View Revenue Templates', 'Add/Edit Revenue Template', 'View Costs Templates' (selected), 'Add/Edit Costs Template', 'View Transaction Templates', 'Add/Edit Transaction Template', and 'Template Data Update'. Below the tabs is a 'Filter Templates' dropdown set to 'All'. A table displays the cost templates:

Template	Template Types	Action
Purchase Bill Template	Bill, Vendor Advances, Vendor Credit	Edit
Bill	Bill, Vendor Advances, Vendor Credit	Edit

Step 11: Users can create or edit their current cost templates by clicking on the “Add/Edit Costs Template.”

The screenshot shows the 'Add/Edit Costs Template' form in the GRIDLEX Sky Accounting & ERP interface. The form includes the following sections:

- Template Name ***: A text input field containing 'Purchase Bill Template'.
- Select Template Type ***: A dropdown menu with options: 'Bill', 'Vendor Credit', and 'Vendor Advances'.
- Custom Objects**: A section with 'Add Custom Objects:' and a text input field, followed by an 'Add' button.
- Template Section ^**: A section with three options:
 - Show Transaction Currency Conversion Details?**: Radio buttons for 'Yes' (selected) and 'No'.
 - Show Item Amounts in which formats?**: A dropdown menu set to 'Recording Currency'.
 - Print Due Date?**: Radio buttons for 'Yes' (selected) and 'No'.
- Choose Standard Fields to Show:**: A table with columns: Standard Field Name, Standard Field Type, Show, Is Required, Print, and Order.

Standard Field Name	Standard Field Type	Show	Is Required	Print	Order
Address Number	Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Step 12: To view all the cost templates, click on “View Transaction Templates”.

<div> <div>GRIDLEX</div> <div> Sky Accounting & ERP Objects Settings My Account </div> </div> <div>ACMEDEMO</div> <div>RED ENTERPRIS...</div>			
<div> <div>Browse Apps</div> <div> <div>Sky Accounting</div> <div> <div>Shortcuts</div> <div>AI Advisor</div> <div>Revenue</div> <div>Customers</div> <div>Costs</div> <div>Vendors</div> <div>Journal</div> <div>Banking</div> <div>Inventory</div> <div>Fixed Assets</div> <div>Reports</div> <div>Settings</div> </div> </div> </div>			
<div> <div>View Revenue Templates</div> <div>Add/Edit Revenue Template</div> <div>View Costs Templates</div> <div>Add/Edit Costs Template</div> <div>View Transaction Templates</div> <div>Add/Edit Transaction Template</div> <div>Template Data Update</div> </div>			
Template	Template Access	Template Type	Action
Salary Template	Transaction and Bank Categorization	Expense	Edit
Transfer from Another Account	Transaction and Bank Categorization	Transfer From Another Account	Edit
Manual Journal	Transaction	Manual Journals	Edit
Deposit from Another Account	Transaction and Bank Categorization	Deposit From Another Account	Edit
Transfer to Another Account	Transaction and Bank Categorization	Transfer To Another Account	Edit
Owner's Contribution	Transaction and Bank Categorization	Owner's Contribution	Edit
Owner's Drawings	Transaction and Bank Categorization	Owner Drawing	Edit
Customer Advance Refund	Transaction and Bank Categorization	Payment Refund	Edit
Expense Refund	Transaction and Bank Categorization	Expense Refund	Edit
Other Income	Transaction and Bank Categorization	Other Income	Edit
Vendor Payment	Transaction and Bank Categorization	Vendor Payment	Edit
Vendor Advance	Transaction and Bank Categorization	Vendor Advance	Edit
Expense	Transaction and Bank Categorization	Expense	Edit
Interest Income	Transaction and Bank Categorization	Interest Income	Edit

Step 13: Users can create or edit their current cost templates by clicking on the “Add/Edit Transaction Template”.

<div>GRIDLEX</div> <div>Sky Accounting & ERP</div> <div>Objects</div> <div>Settings</div> <div>My Account</div>	<div>ACMEDEMO</div> <div>RED ENTERPRIS...</div>
<div>Browse Apps</div> <div>Sky Accounting</div> <div>Shortcuts</div> <div>AI Advisor</div> <div>Revenue</div> <div>Customers</div> <div>Costs</div> <div>Vendors</div> <div>Journal</div> <div>Banking</div> <div>Inventory</div> <div>Fixed Assets</div> <div>Reports</div> <div>Settings</div>	<div>View Revenue Templates</div> <div>Add/Edit Revenue Template</div> <div>View Costs Templates</div> <div>Add/Edit Costs Template</div> <div>View Transaction Templates</div> <div>Add/Edit Transaction Template</div> <div>Template Data Update</div>
<div><div>Template Name</div><div>Manual Journal</div></div> <div><div>Transaction Display Name</div><div>Journal</div></div> <div><div>Transaction Type</div><div>Manual Journals</div></div>	
<div>Custom Objects</div> <div>Add Custom Objects:</div> <div><div></div><div>Add</div></div>	
<div>Template Section</div> <div><div>Show Transaction Mode?</div><div><div>Yes</div><div>No</div></div><div><div>Is Required?</div><div></div></div></div> <div><div>Show Transaction Reference?</div><div><div>Yes</div><div>No</div></div><div><div>Is Required?</div><div></div></div></div> <div><div>Show Transaction Description?</div><div><div>Yes</div><div>No</div></div><div><div>Is Required?</div><div></div></div></div> <div><div>Show Transaction Currency Conversion Details?</div><div><div>Yes</div><div>No</div></div></div> <div><div>Show Item Amounts in which formats?</div><div>Recording Currency</div></div> <div><div>Use Common Debit Account?</div><div><div>Yes</div><div>No</div></div></div> <div><div>Use Common Credit Account?</div><div><div>Yes</div><div>No</div></div></div> <div><div>Allow only selected Debit Account Types</div><div>Select Debit Account Types</div></div>	

Step 14: Users can also update their existing templates data by clicking on the “Template Data Update”. Here, users are required to add entity address, entity logo, and signature. After finishing, click on “Map” to update the data.

The screenshot displays the Gridlex Sky Accounting & ERP software interface. The top navigation bar includes the Gridlex logo, user account options (Sky Accounting & ERP, Objects, Settings, My Account), and a demo account indicator (ACME DEMO, RED ENTERPRISE). A left sidebar lists various application areas under 'Browse Apps', including Sky Accounting, Shortcuts, AI Advisor, Revenue, Customers, Costs, Vendors, Journal, Banking, Inventory, Fixed Assets, Reports, and Settings. The main content area is titled 'Template Data Update' and contains a form for editing or adding template data. The form includes fields for 'Entity Address/Details', 'Entity Logo', and 'Signature', each with a 'Choose image file...' button and a 'Browse' button. A checkbox labeled 'Exclude existing template data' is also present. A 'Map' button is located at the bottom right of the form.

By following these steps, you can customize the revenue, cost, and transaction templates in Gridlex Sky accounting software to meet the specific needs of your business. This will help you streamline your accounting processes and make it easier to track and manage your financial data.

Quick Tip

Gridlex Sky offers a list of shortcuts for common tasks. With the help of these quick shortcuts, users can easily navigate to this page without having to scroll through other sections. Click on “Create your **Revenue Templates**, **Cost Templates** and **Transaction Templates** to customize for your business” to edit/add templates quickly and easily.

Browse Apps

Sky Accounting

Shortcuts

AI Advisor
Revenue
Customers
Costs
Vendors
Journal
Banking
Inventory
Fixed Assets
Reports
Settings

Shortcuts

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 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.

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