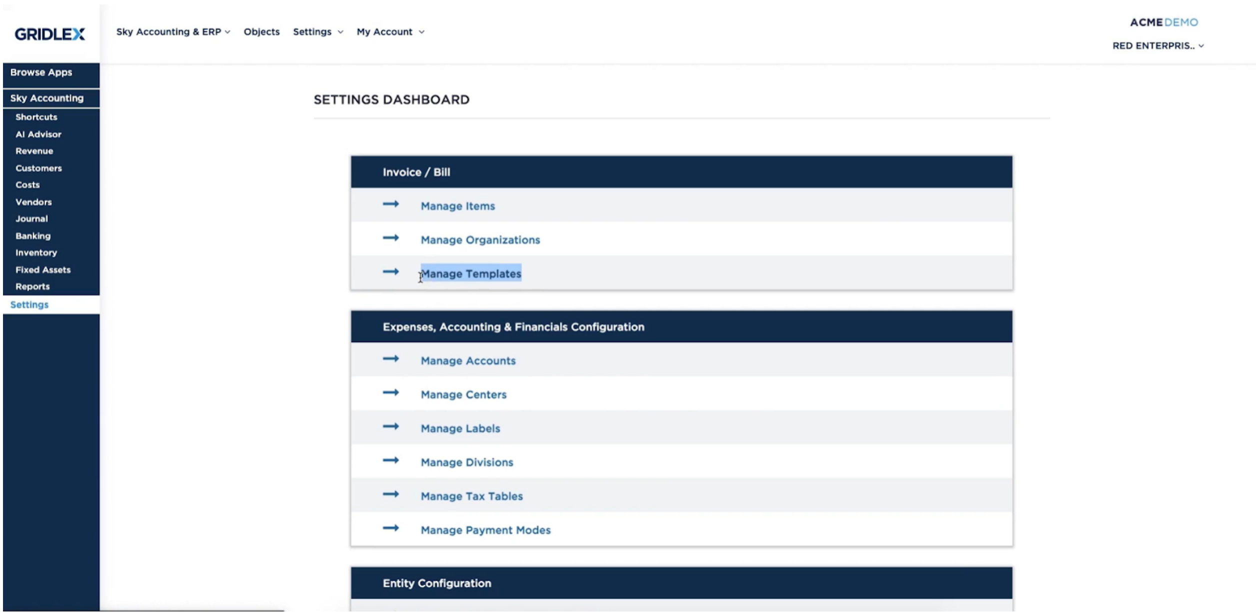
Gridlex Sky enables users to create custom templates for their company's revenue, cost, and transaction reports. With the help of Gridlex Sky, users can customize the appearance of various sales, purchase and transaction templates as per their business requirements. This can be done by utilizing the 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.

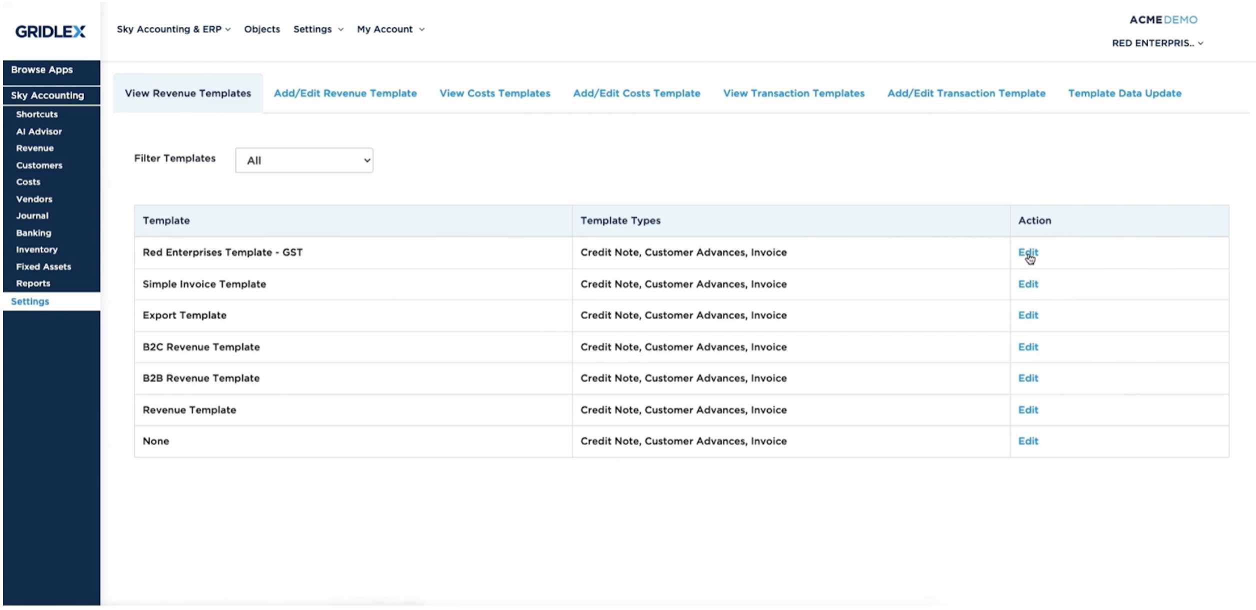
If you need any help with any feature, data migration of your old accounting data, questions on Chart of Accounts (COA) or anything at all, just email apps@gridlex.com, and our team of expert accountants will be here to help you. Remember, that one of Gridlex's core values is Customer Success. We want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

How to Customize Revenue/Cost/Transaction Templates in Gridlex Sky?

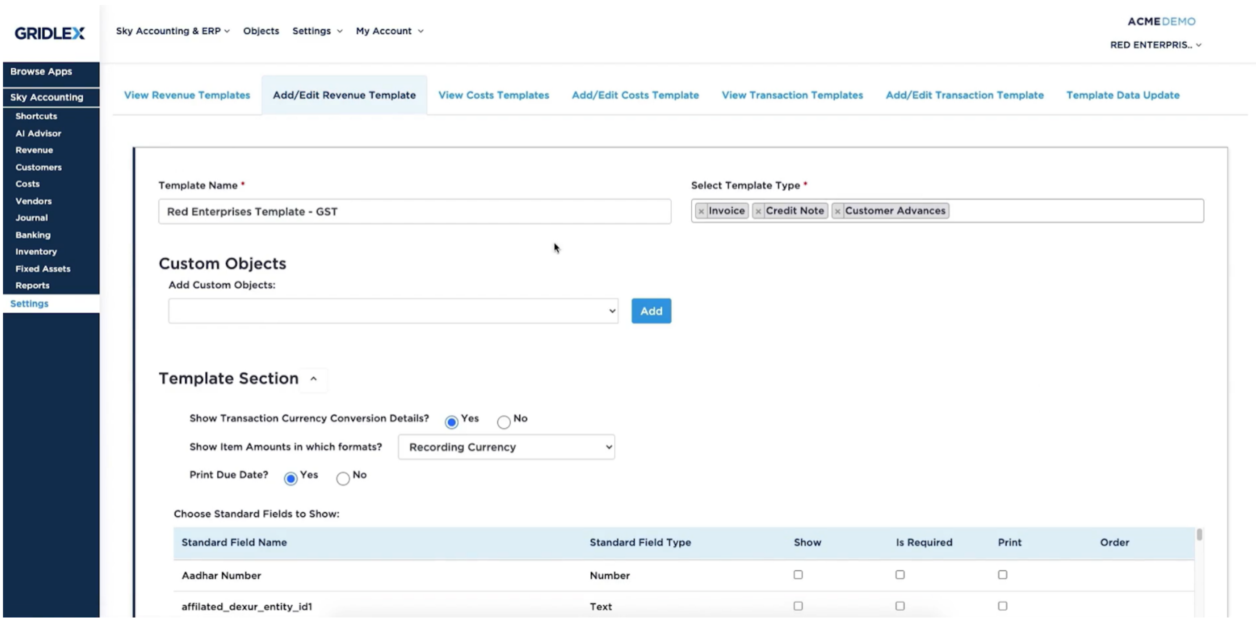
Step 1: Login into your Gridlex App Suite Account and choose the entity of your choice. Go to the "Settings" menu and select the "Manage Templates" tab.



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

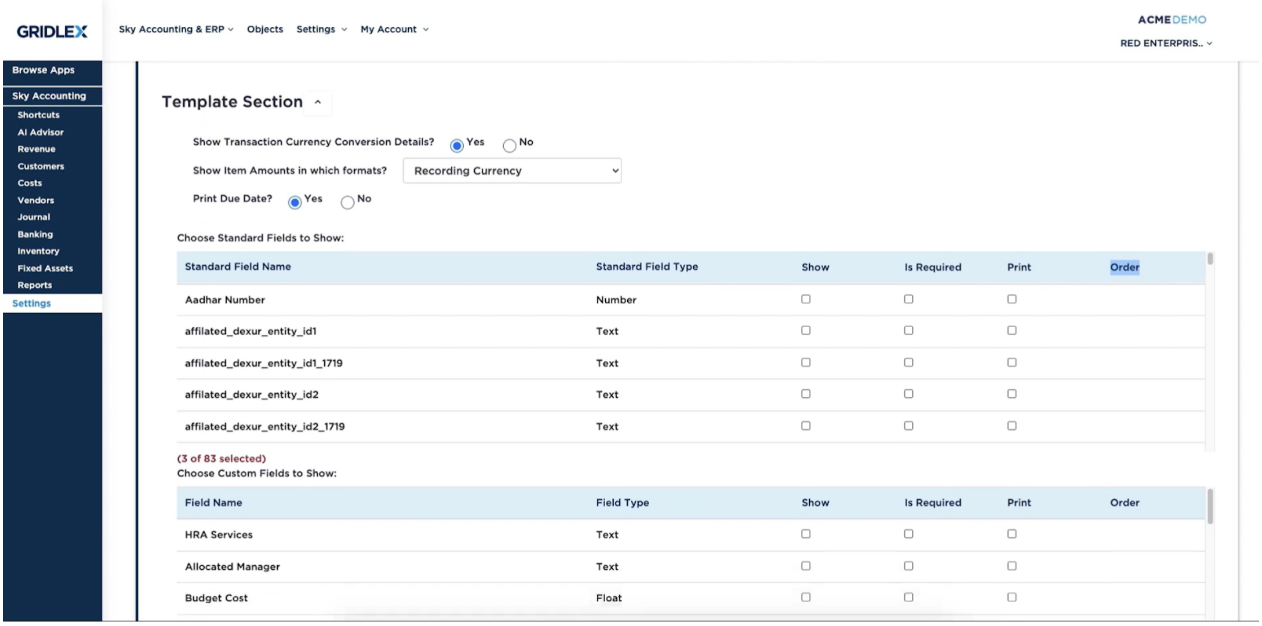


Step 3: To create or edit a new revenue template, click on “Add/Edit Revenue Template. Here, add your template name and select template type i.e, Invoice, Credit Note, Customer Advances. Users can also add custom objects (if any).

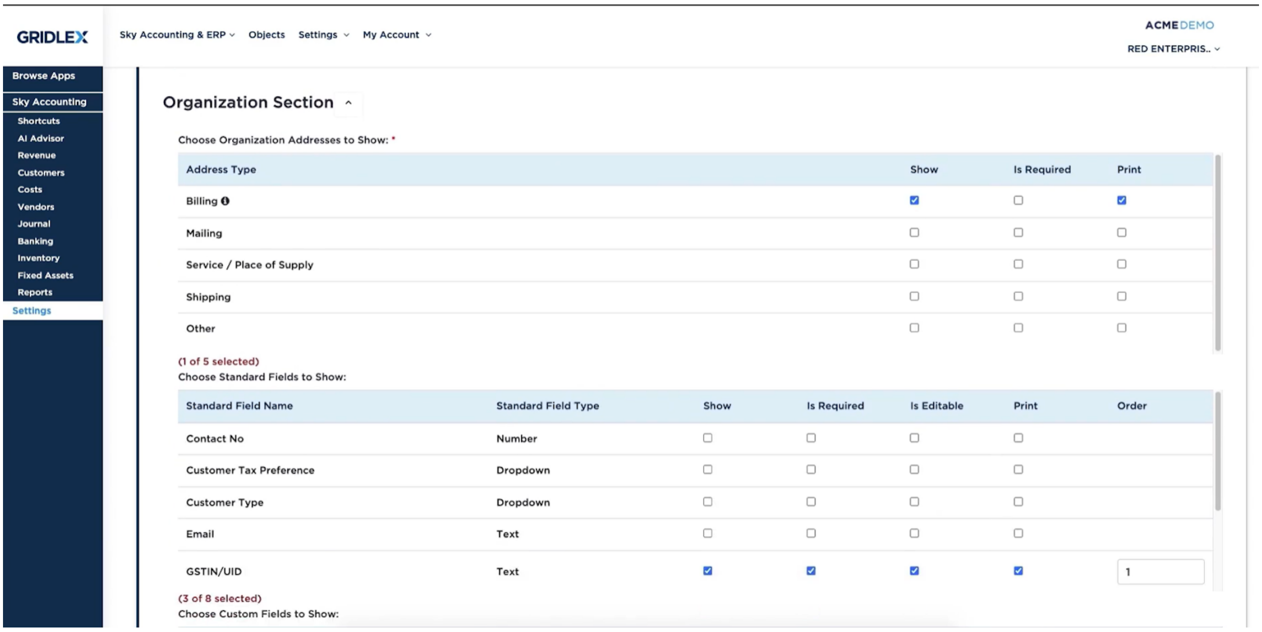


Step 4: In the Template Section, add standard Fields/Custom fields (if any) related to entity business & set configuration of Show/ Is required/ Print/

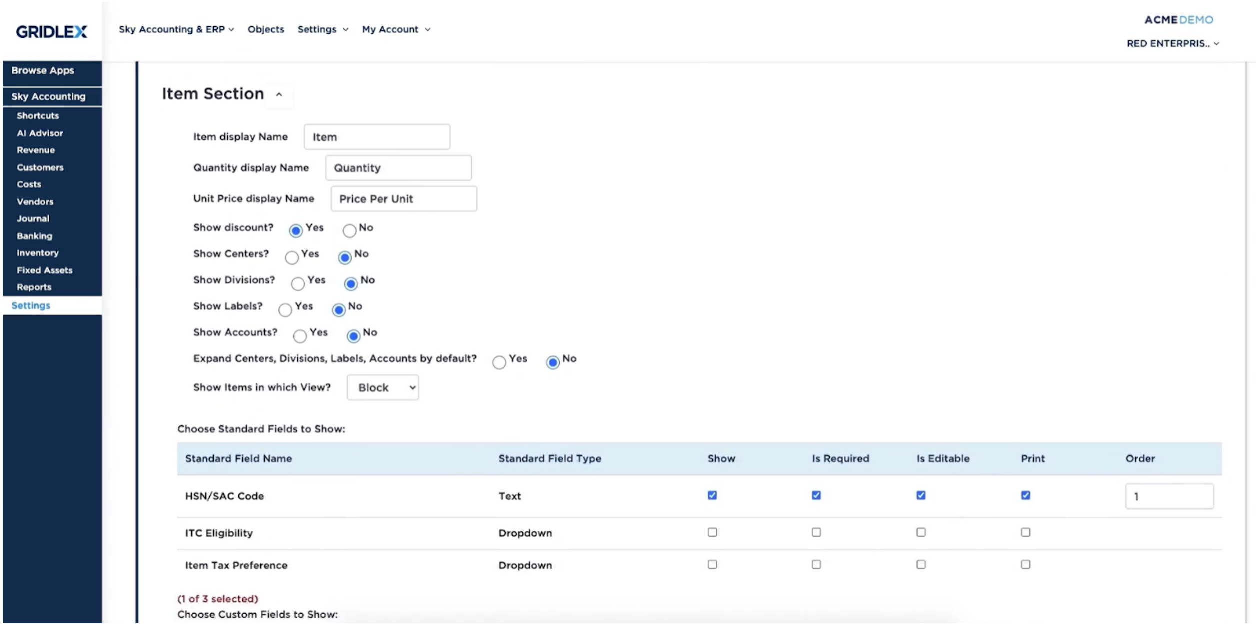
Order. Fill in other fields like show transaction currency details (Yes/No) as per business requirements. In addition, select the formats of amount i.e. Recording Currency/ Recording & Reporting Currency.



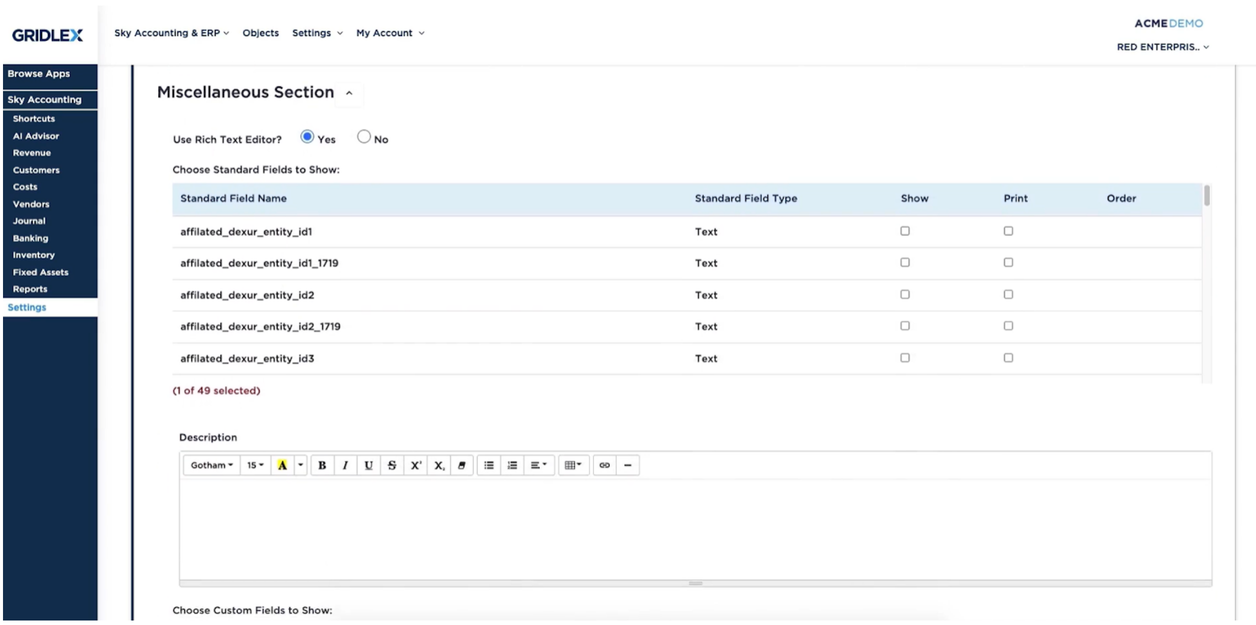
Step 5: In the Organization Section, choose the organization address type & set configuration of Show/ Is required/ Print /Order. Fill in standard Fields/ Custom fields & set configuration of Show/ Is required/ Print /Order. Here, users are required to create custom fields from Master Data Management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



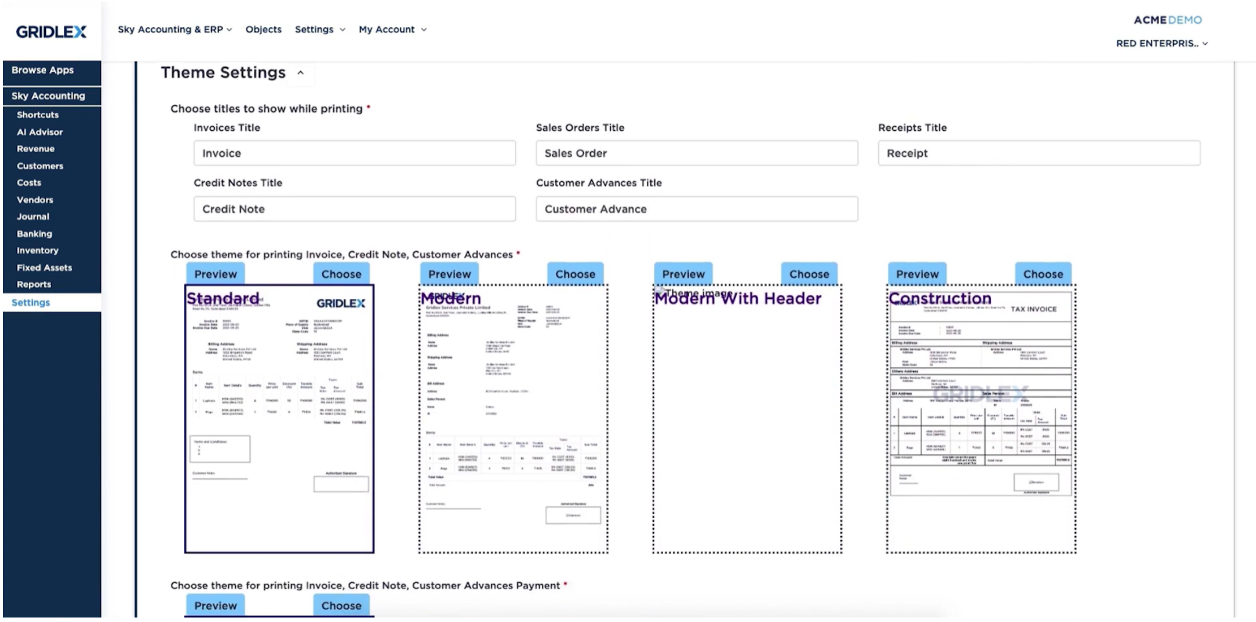
Step 6: In Item Section, choose item display name, quantity display name, and unit price display name. Fill in all the details like discount/ centers/ divisions/ labels/ accounts/ Expand centers,divisions,labels (Yes/No) etc. After filling in the standard details related to the entity business, users can set configuration i.e. Show/ Is required/ Print/ Order.



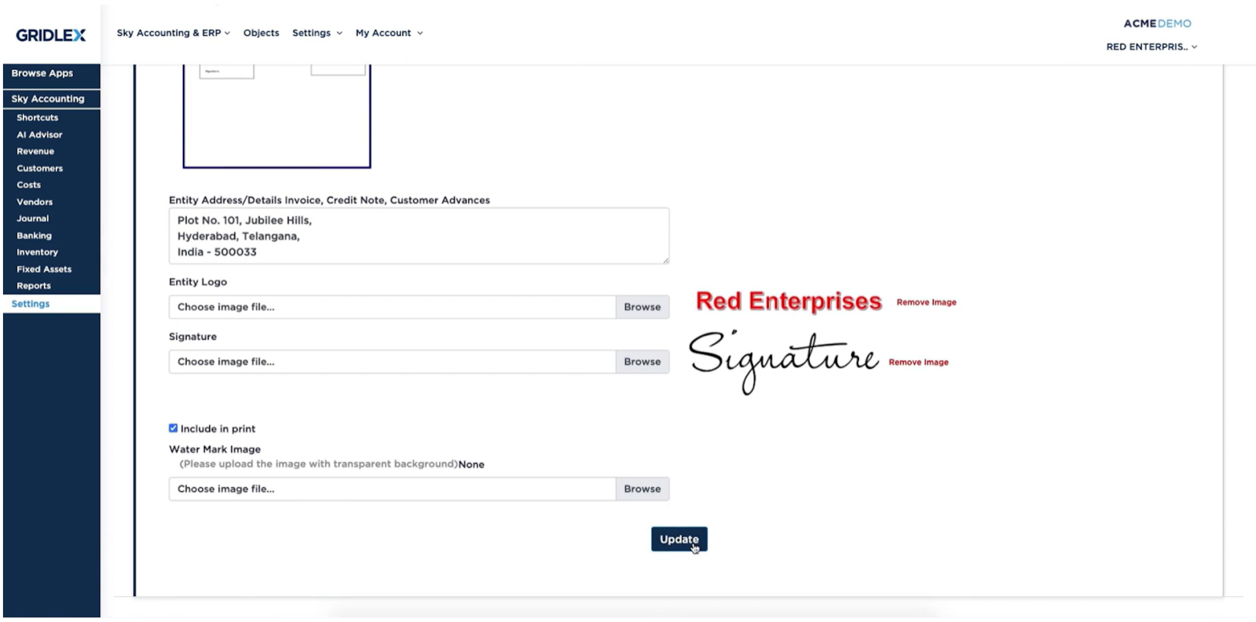
Step 7: In the Miscellaneous Section, choose Rich Text Editor. Choose the standard Fields/Custom Fields to be shown in the template. Users can customize it according to their entity business and set configuration of Show/ Is required/ Print/ Order.



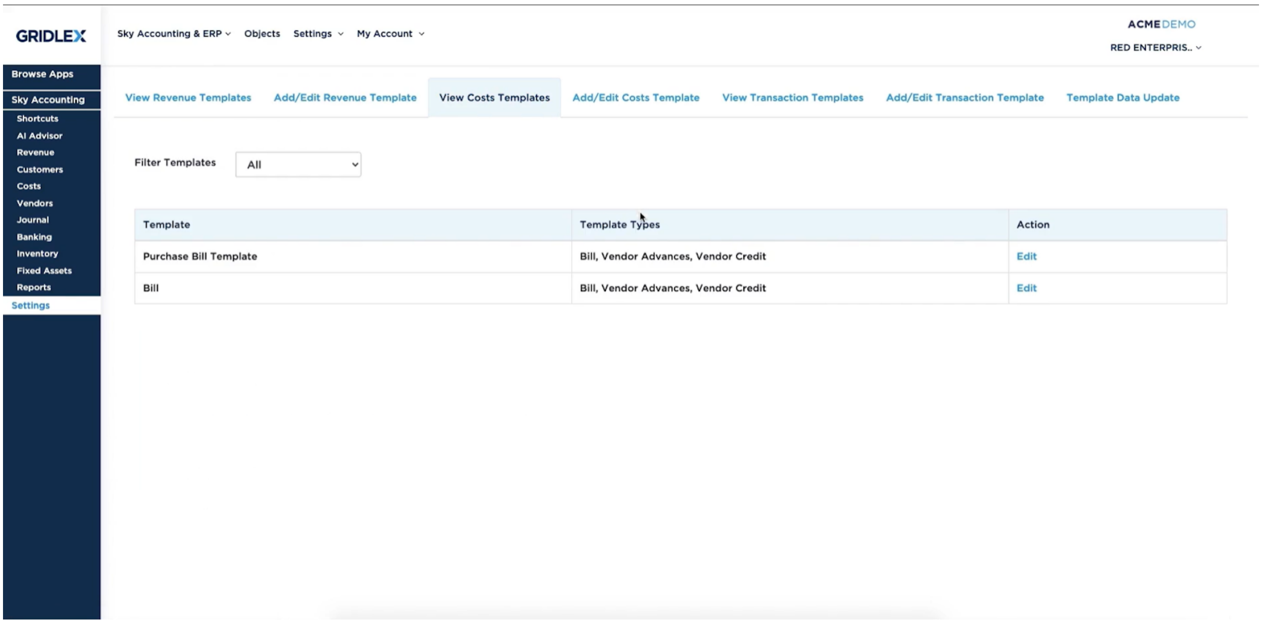
Step 8: In Theme Setting Section, change the tiles of Invoice/bill, Sales/ Purchase order, Customer/Vendor advances, Receipts Title, etc as per enterprise names. Choose the theme of your choice for printing.



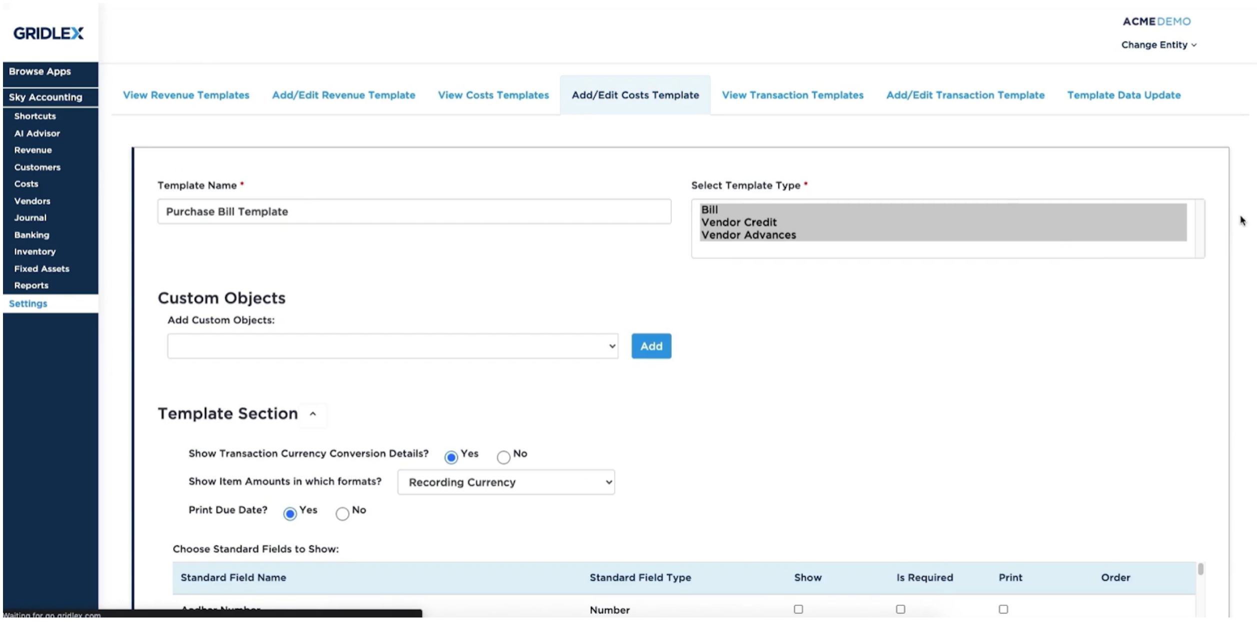
Step 9: Fill Entity address, Entity logo and Signature file. Update/Save it once done with the settings.



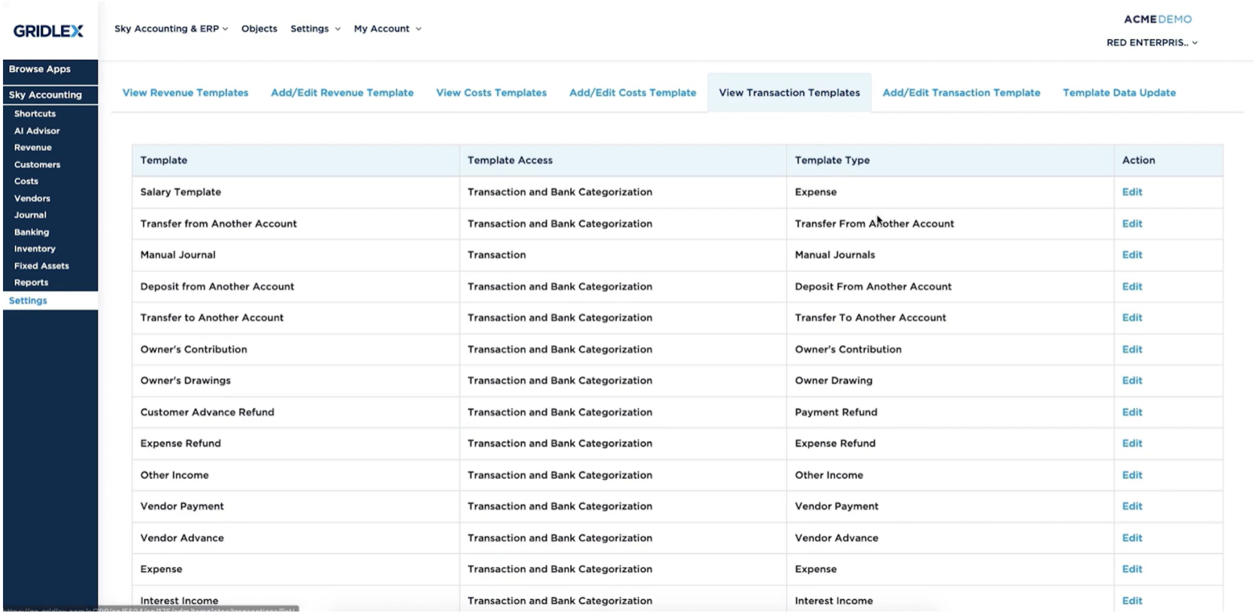
Step 10: You have successfully created/edited the revenue template. The same procedure is repeated for the cost and transaction templates as well. To view all the cost templates, click on “View Costs Templates”.



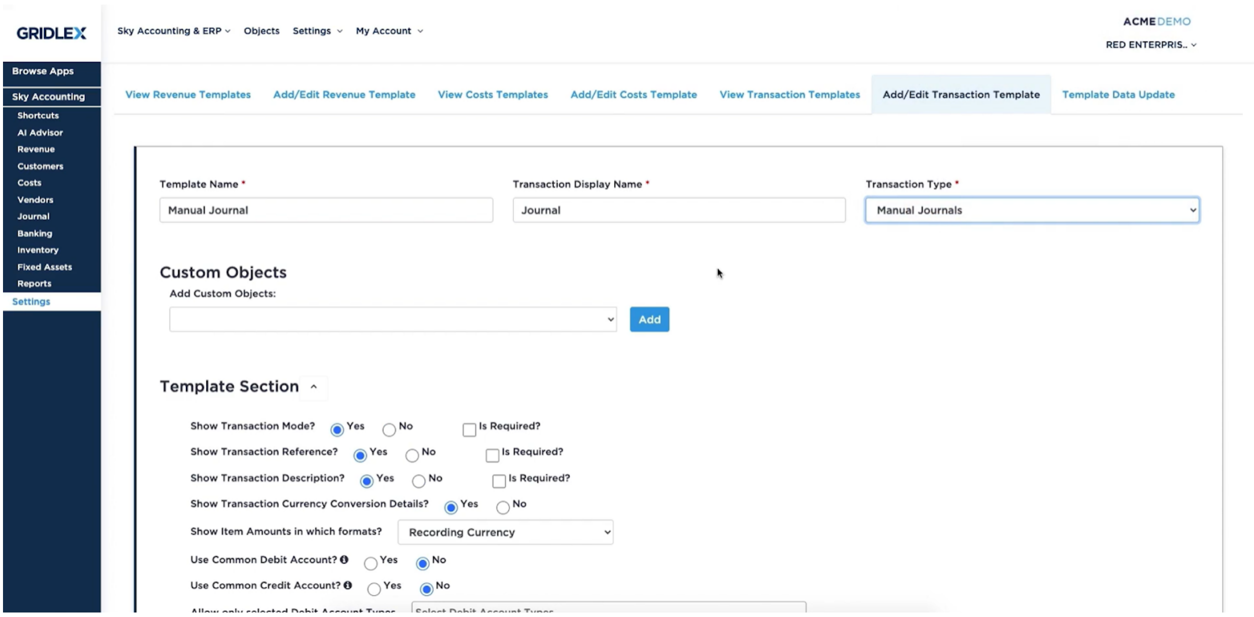
Step 11: Users can create or edit their current cost templates by clicking on the “Add/Edit Costs Template.”



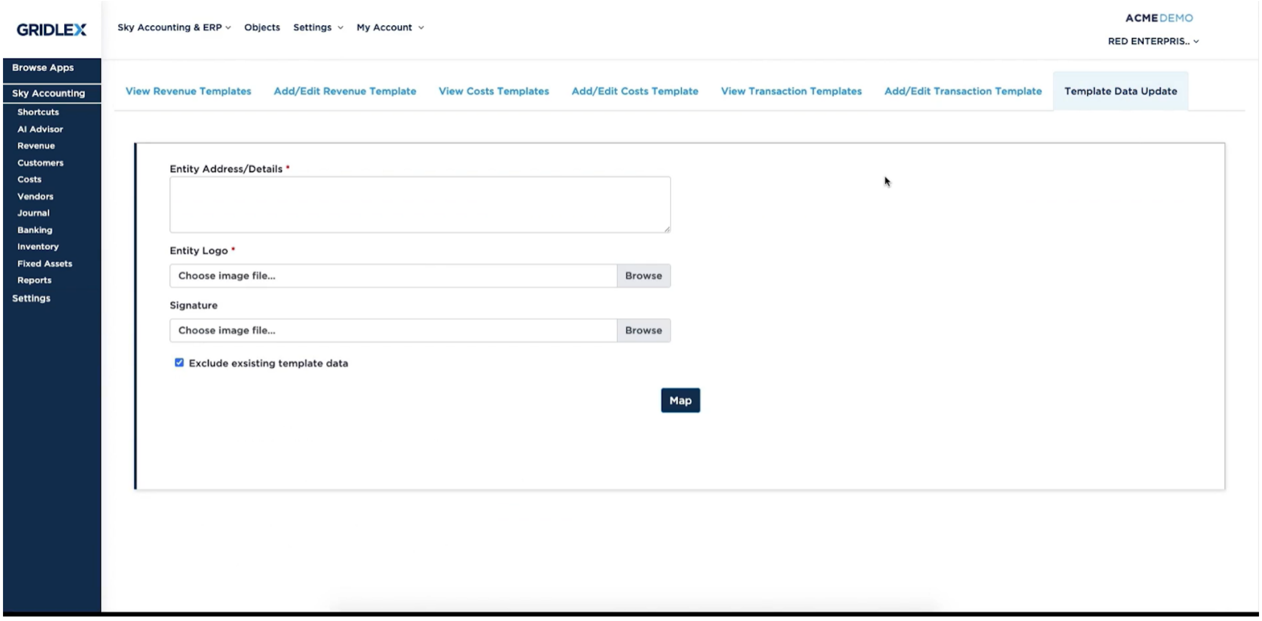
Step 12: To view all the cost templates, click on “View Transaction Templates”.



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



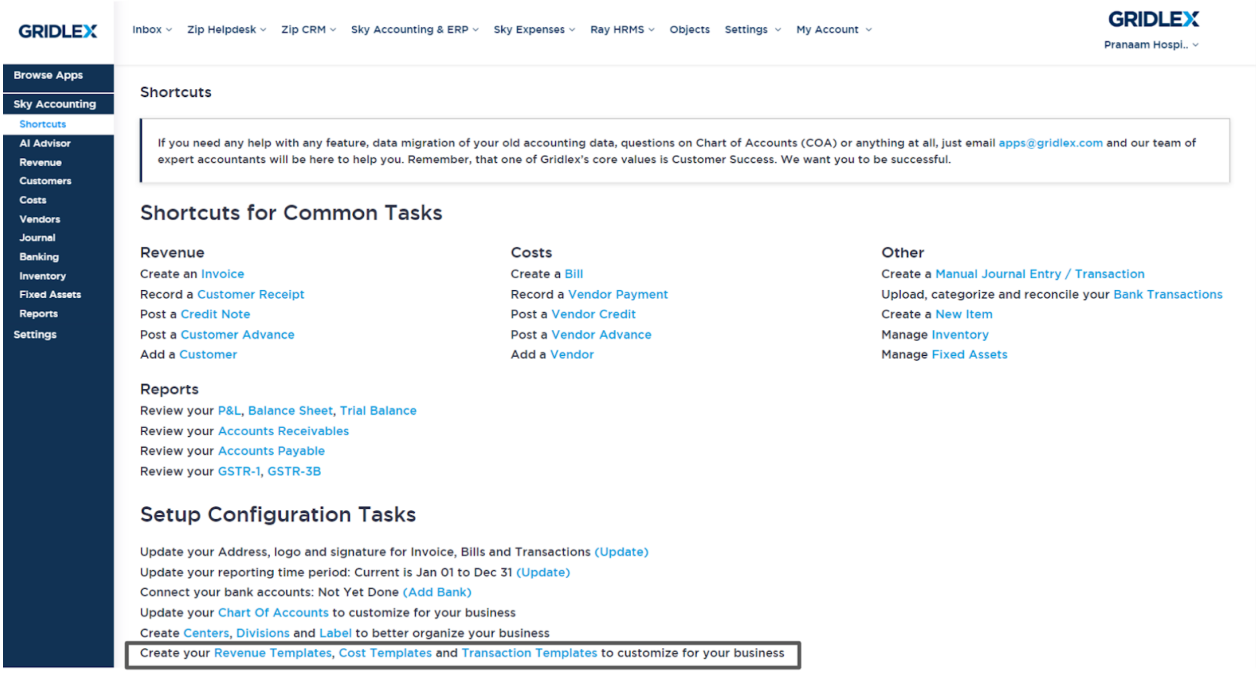
Step 14: Users can also update their existing templates data by clicking on the “Template Data Update”. Here, users are required to add entity address, entity logo, and signature. After finishing, click on “Map” to update the data.



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.


GRIDLEX
Inbox
Zip Helpdesk
Zip CRM
Sky Accounting & ERP
Sky Expenses
Ray HRMS
Objects
Settings
My Account
GRIDLEX
Pranaam Hospi..
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