Create an Expense

How to Create an Expense in Muhasib ERP

Overview

This guide will help you record an approved expense with the correct classification, amount, counterparty, and payment status.

Muhasib records the expense and may create an outstanding payable or linked payment.

Who can do this

You need access to Expense entry plus expense type, account, tax, location, and counterparty.

Before you start

Have invoice/receipt evidence, date, payee, description, expense head, amount, tax, location, reference, due/payment details, and approval.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Expenses & Vouchers → Transactions → Expense.

Create an Expense

Step 1: Start a new expense

Step 2: Enter date, payee, reference, and description

Step 3: Select expense head/subtype, location, and account/defaults

Step 4: Enter net amount, tax, and total from the evidence

Step 5: Confirm whether the expense is unpaid or being settled now

Step 6: Review authorization and save once

Check your work

Compare and Confirm the saved expense to evidence, expense report, outstanding balance, tax, and general ledger.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Search by reference before retrying.
- Do not record the same cost as both an expense and purchase unless policy requires a linked process.

Related guides

- Record an Expense Payment
- Review an Expense and Its Payment History
- Update or Correct an Expense

What to do next

> **Record an Expense Payment**.

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