Use a Pre-Written Expense Description

How to Use a Pre-Written Expense Description in Muhasib ERP

Overview

This guide will help you select a standardized description and adapt it without losing transaction-specific meaning.

The standardized but specific description is stored with the expense and appears in relevant views/reports.

Who can do this

You need access to Expense entry; separate setup permission may be required to maintain descriptions.

Before you start

Know the actual business purpose, period, payee, and evidence; a template must not replace factual detail.

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

Where to find it

Within Expense entry, use the pre-written description selector.

Use a Pre-Written Expense Description

Step 1: Select the description closest to the business event

Step 2: Review the inserted text

Step 3: Add transaction-specific identifiers, dates, periods, or purpose

Step 4: Remove statements that do not apply

Step 5: Confirm the final description matches the evidence

Step 6: Complete and save the expense

Check your work

Reopen the expense and confirm the description is accurate, complete, and distinguishable from similar entries.

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

If something goes wrong

- Do not leave placeholder text unchanged when it is inaccurate.
- Request controlled setup maintenance if no suitable template exists.

Related guides

- Create an Expense
- Create an Expense Type or Head
- Update or Correct an Expense

What to do next

> **Create an Expense**.

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