

View an Expense Report

How to view an Expense Summary Report in Muhasib ERP?

Overview

The **Expense Summary Report** provides a consolidated view of all recorded expenses within a selected date range. It enables users to analyze expenses based on Expense Type, Payment Status, and keywords, making it easier to monitor spending, review outstanding expenses, and generate financial reports.

Muhasib ERP allows you to filter expense records before generating the report, ensuring that only the required information is displayed. The report can also be printed for record keeping, auditing, and management purposes.

i Example

A finance manager wants to review all unpaid utility expenses recorded during the current month. By applying the appropriate date range, Expense Type, and Payment Status filters, the system generates a report showing only the required records.

Before You Begin

Before viewing the Expense Summary Report, ensure the following requirements are met.

Requirement	Description
Permissions	You have permission to access Expense Reports.
Recorded Expenses	Expense records already exist in the system.
Expense Types	Expense Types have been created and assigned to expenses.

Tip

Apply filters before generating the report to quickly locate specific expense records and improve report readability.

View an Expense Summary Report

Step 1: Open the Expense Summary Report

Navigate to:

Expenses & Vouchers → Reports → Expense Summary Report

The **Expense Summary Report** window opens.

Step 2: Apply Report Filters

Select the required filters before generating the report.

Filter	Description
Filter by Keyword	Search expenses using keywords such as the Short Description.
Expense Type	Display expenses for a specific Expense Type or select All .
Date From / Date To	Specify the reporting period.
Payment Status	Filter expenses by All , Paid , Partial Paid , or Unpaid .

i Note

Multiple filters can be combined to generate a more specific Expense Summary Report.

Step 3: Generate the Report

Click the **Apply Filter** button.

Muhasib ERP retrieves all matching expense records and displays them in the report preview.

Result

The Expense Summary Report is generated using the selected filters.

Step 4: Review the Report

Review the generated report to verify that it contains the required expense records.

The Expense Summary Report displays the following information for each expense.

Column	Description
Date & Time	Date and time when the expense was recorded.
Short Description	Brief description of the expense.
Long Description	Additional information entered for the expense.
Expense Type	The Expense Type assigned to the expense.
Type Parent	Parent category of the selected Expense Type.
Recorded By	User who recorded the expense.
Amount (Rs.)	Total recorded expense amount.
Payment Status	Current payment status (Paid, Partial Paid, or Unpaid).
Total Expenses	Displays the total amount of all expenses included in the report.

Note

The report displays only the expenses that match the selected filters.

Step 5: Print the Report

Click the **Print Report** button located at the top-right corner of the window.

Muhasib ERP opens the print preview of the Expense Summary Report.

Review the report and click **Print Report** to send it to the selected printer.

Success

The Expense Summary Report has been generated successfully and is ready for printing.

Step 6: Close the Window

After reviewing or printing the report, close the Expense Summary Report window or generate another report using different filter criteria.

Result

Expense Summary Report Generated Successfully

- All matching expense records are displayed according to the selected filters.
- The report provides a complete overview of expense activity during the selected period.
- Total expenses are automatically calculated.
- The report is available for printing and record keeping.

Best Practices

- Always apply appropriate filters before generating the report.
- Use Payment Status filters to monitor outstanding expenses.
- Review the reporting period before printing the report.
- Regularly generate Expense Summary Reports to monitor organizational spending.
- Print or archive reports for auditing and financial record keeping.

Frequently Asked Questions

Can I filter the Expense Summary Report?

Yes. You can filter the report using Keyword, Expense Type, Date Range, and Payment Status.

Can I view only unpaid expenses?

Yes. Select the **Unpaid** Payment Status filter before generating the report.

Can I generate a report for a specific Expense Type?

Yes. Select the required Expense Type from the dropdown list.

Does the report show the total expense amount?

Yes. Muhasib ERP automatically calculates and displays the total value of all expenses included in the report.

Can I print the Expense Summary Report?

Yes. Click the **Print Report** button to open the print preview and print the report.

Related Articles

- [Create an Expense](#)
 - [Update an Expense](#)
 - [Delete an Expense](#)
 - [Record an Expense Payment](#)
 - [Print an Expense Payment Receipt](#)
 - [View Expense Details Report](#)
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Next Step

Continue by learning how to **View an Expense Details Report** to analyze complete information for individual expense records.

Product: Muhasib ERP

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