View Expense Inquiry

How to View an Expense Inquiry Report in Muhasib ERP

Overview

The **Expense Inquiry** window provides a centralized view of all recorded expense transactions in Muhasib ERP. It allows users to search, filter, and review expense records without making any changes to the underlying data.

Using the available search filters, users can quickly locate specific expenses based on transaction number, payment status, expense type, and date range. The inquiry window also provides access to complete expense details, including payment history.

> **ℹ Example**
> Suppose you need to verify whether an office utility expense has been fully paid. You can use the Expense Inquiry window to search the transaction, review its details, and view all associated payment records.

Before You Begin

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

Requirement	Description
Permissions	You have permission to access Expense Inquiry reports.
Expense Records	One or more Expense Entries already exist in the system.
Expense Payments	Payment records are available if you want to review payment history.

> **Tip**
> Use the available filters to narrow down the search results before opening an expense record.

View an Expense Inquiry Report

Step 1: Open Expense Inquiry

Navigate to:

Back Office → Reports → Accounting and Finance → Expense Inquiry

The **Expense Inquiry** window opens.

Step 2: Search for an Expense

Locate the required expense using one or more of the available filters.

Search Option	Description
Search by Invoice No.	Search a specific expense using its transaction/invoice number.
Date Range	Specify the From and To dates to display expenses recorded within a selected period.
Payment Status	Filter records by **All**, **Paid**, **Partial Paid**, or **Unpaid**.
Expense Type	Display only expenses belonging to a selected Expense Type.

Click **Filter** to display the matching expense records.

> **Note**
> You can combine multiple filters together to quickly locate a specific expense transaction.

Step 3: Select the Expense Record

Select the required expense from the **Expense Records** table.

The inquiry grid displays information including:

- Transaction Number
- Date Recorded

- Short Description
- Long Description
- Parent Expense Type
- Expense Type
- Expense Amount
- Payment Status

Click **View Record**.

> **Result**
> The selected Expense Entry opens in read-only mode displaying complete transaction details.

Step 4: Review Expense Details

After clicking **View Record**, Muhasib ERP opens the selected Expense Entry in a read-only inquiry window.

The following information is available for review.

Field	Description
Expense ID	Displays the unique system-generated Expense ID.
Transaction Number	Displays the transaction reference number.
Amount	Displays the recorded expense amount.
Short Description	Displays the short description of the expense.
Expense Type	Displays the assigned Expense Type.
Long Description	Displays additional information recorded for the expense.
Expense Date	Displays the date on which the expense was recorded.
Fiscal Year	Displays the fiscal year associated with the expense.
Recorded By	Displays the user who recorded the expense.

> **Note**
> Expense Inquiry is a read-only feature. It allows users to review expense information without modifying the original transaction.

Step 5: Review Payment Records

If payments have been recorded against the selected expense, they are displayed in the **Payment Account Records** section.

The payment history includes the following information.

Column	Description
Payment ID	Unique payment record identifier.
Transaction No.	Payment transaction number.
Date	Date when the payment was recorded.
Payment Amount	Amount paid against the expense.
Payment Type	Displays the selected payment method.
Payment Account	Displays the account used for the payment.

> **Tip**
> Reviewing payment records helps verify outstanding balances, payment history, and the account used for each payment.

Step 6: Close the Window

After reviewing the required information, close the Expense Inquiry window or continue reviewing additional expense records.

Result

Expense Inquiry Viewed Successfully

- The selected Expense Entry has been reviewed successfully.
- Complete expense details are available for verification.
- Associated payment records can be reviewed without modifying the original transaction.
- Expense information can be verified before reporting, auditing, or reconciliation.

Best Practices

- Use search filters to quickly locate the required expense.
- Review payment history before making financial decisions.
- Verify payment status before recording additional payments.
- Use Expense Inquiry to validate transactions before generating reports.
- Periodically review expense records to ensure financial accuracy.

Frequently Asked Questions

Can I edit an expense from Expense Inquiry?

No. Expense Inquiry is a read-only screen used for reviewing expense records.

Can I search for a specific expense?

Yes. You can search using the transaction number, date range, payment status, and expense type filters.

Can I view payment history for an expense?

Yes. All recorded payments associated with the selected expense are displayed in the Payment Account Records section.

Can I view unpaid expenses only?

Yes. Select the **Unpaid** payment status filter and apply the search.

Does Expense Inquiry change any data?

No. Viewing expense records does not modify any transaction.

Related Articles

- Create an Expense
- Update an Expense
- Delete an Expense
- Record an Expense Payment
- View Expense Summary Report
- View Head-wise Expense Summary Report

Next Step

Continue by learning how to **Print an Expense Receipt** or generate additional Expense Reports for further analysis.

Product: Muhasib ERP

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