

View Head-Wise Expense Summary Report

How to View Head-Wise Expense Summary Report

Overview

The **Head-Wise Expense Summary Report** provides a summarized view of expenses grouped by Expense Type (Expense Head). Instead of displaying every individual expense transaction, this report consolidates expenses under each Expense Head and calculates the total amount recorded for each category during the selected reporting period.

This report helps finance teams analyze spending patterns across different expense categories, identify major cost areas, and monitor overall expense distribution without reviewing individual transactions.

i Example

A finance manager wants to compare how much the organization spent on **Utilities, Travel, and Office Supplies** during the current month. Instead of reviewing hundreds of expense records, the Head-Wise Expense Summary Report displays the total amount spent under each Expense Type.

Before You Begin

Before generating the Head-Wise Expense Summary Report, ensure the following requirements are met.

Requirement	Description
Permissions	You have permission to access Expense Reports.

Requirement	Description
Recorded Expenses	Expense records exist in the selected reporting period.
Expense Types	Expense Types have already been created and assigned to expense entries.

 **Tip**

Use a suitable reporting period to generate a meaningful summary and make category-wise expense comparisons easier.

View Head-Wise Expense Summary Report

Step 1: Open the Head-Wise Expense Summary Report

Navigate to:

Expenses & Vouchers → Reports → Expense Summary Head-wise Report

The **Expense Summary Head-wise Report** window opens.

Step 2: Apply Report Filters

Select the required filters before generating the report.

Filter	Description
Filter by Keyword	Search report data using keywords related to Expense Types.
Date From / Date To	Select the reporting period for the summary.

 **Note**

The report summarizes only those Expense Types that contain expense records matching the selected filters.

Step 3: Generate the Report

Click the **Apply Filter** button.

Muhasib ERP processes the selected criteria and generates the Head-Wise Expense Summary Report.

Result

The Head-Wise Expense Summary Report is generated and displayed on the screen.

Step 4: Review the Report

Review the generated report to verify the summarized expense information.

The Head-Wise Expense Summary Report displays the following information.

Column	Description
Sr. No.	Sequential number assigned to each Expense Type in the report.
Expense Type	The Expense Head under which expenses have been recorded.
Type Parent	Displays the parent Expense Type, if one has been assigned.
Total Amount (Rs.)	Total amount recorded against the corresponding Expense Type during the selected reporting period.
Total Expenses	Displays the combined total of all Expense Types included in the report.

Note

The report displays summarized totals only. Individual expense transactions are not shown in this report.

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 Head-Wise Expense Summary Report.

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

Success

The Head-Wise 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 Head-Wise Expense Summary Report window or generate another report using different filter criteria.

Result

Head-Wise Expense Summary Report Generated Successfully

- Expense records are grouped by Expense Type.
- The total amount for each Expense Type is automatically calculated.
- The report provides a quick overview of spending by expense category.
- The report is available for printing and financial record keeping.

Best Practices

- Generate Head-Wise reports regularly to monitor category-wise spending.
 - Use appropriate date ranges for meaningful financial analysis.
 - Review expense category totals before preparing financial statements.
 - Periodically review Expense Types to maintain a well-organized expense structure.
 - Print or archive reports for auditing and management review.
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Frequently Asked Questions

What does the Head-Wise Expense Summary Report show?

It summarizes total expenses grouped by Expense Type instead of displaying individual expense transactions.

Can I filter the report?

Yes. You can filter the report using Keyword and Date Range before generating it.

Does the report display individual expense entries?

No. This report displays only summarized totals for each Expense Type.

Can I print the Head-Wise Expense Summary Report?

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

Does the report calculate the overall expense total?

Yes. Muhasib ERP automatically calculates and displays the combined total of all Expense Types included in the report.

Related Articles

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

Continue by learning how to **View an Expense Payment Report** to analyze payments recorded against expenses.

Product: Muhasib ERP

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