Email a Muhasib Report Safely

How to Email a Muhasib Report Safely in Muhasib ERP

Overview

This guide will help you send the correct filtered report to verified recipients without disclosing unauthorized data.

Muhasib submits the message through set up email delivery; submission does not prove recipient acceptance.

Who can do this

You need access to Report view and email action access, plus authorization for the data and recipients.

Before you start

Confirm report filters, recipient identities, purpose, classification, attachment format, email settings, and approval.

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

Where to find it

Open and filter the report → Email Report.

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Step 1: Generate the report with exact company/date/entity filters

Step 2: Review totals and sensitive fields

Step 3: Open Email Report

Step 4: Enter and verify To/Cc recipients, subject, and message

Step 5: Confirm attachment/preview matches the filtered report

Step 6: Send once and retain the result

Check your work

Confirm send result and controlled mailbox receipt with the correct attachment and scope.

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

If something goes wrong

- Do not retry a timeout until sent-mail/provider evidence is checked.
- Remove unauthorized recipients before sending.

Related guides

- Configure Email Delivery
- Diagnose an External Integration Failure
- Print, Export, or Email a Report

What to do next

> **Configure Email Delivery**.

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