Review the Sales Summary Report

How to Review the Sales Summary Report in Muhasib ERP

Overview

This guide will help you summarize sales for a defined scope and compare and confirm the total to detailed transactions.

You get a reproducible sales control total.

Who can do this

You need access to Sales Summary Report and relevant sales visibility.

Before you start

Define company, period, locations, terminals, users, statuses, return handling, tax basis, and expected total.

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

Where to find it

Back Office → Sales & Customers → Sales Summary Report.

Review the Sales Summary Report

Step 1: Set exact scope filters

Step 2: Generate the report

Step 3: Review transaction count, gross/subtotal, discount, tax, charges, returns, and net/grand

Review transaction count, gross/subtotal, discount, tax, charges, returns, and net/grand totals shown.

Step 4: Compare groups by date/location/terminal/user where available

Step 5: Drill to Detailed Sales Summary or Sale Inquiry

Step 6: Reconcile payment and financial controls separately

Check your work

The summary equals allowed Sale Inquiry transactions for identical filters and status/sign rules.

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

If something goes wrong

- Do not compare gross to net totals without aligning components.
- Check held, temporary, offline, cancelled, and returned records.

Related guides

- Review the Detailed Sales Summary Report

- Review Sale Inquiry
- Review the Daily Sale and Return Summary

What to do next

> **Review the Detailed Sales Summary Report**.

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