Review the Tax Summary Report

How to Review the Tax Summary Report in Muhasib ERP

Overview

This guide will help you summarize tax by set up category and compare and confirm the totals to detailed tax transactions.

You get summarized tax controls for review.

Who can do this

You need access to Tax Summary Report and authorized tax/company scope.

Before you start

Define company, registration, period, tax codes/types, source families, return treatment, and expected tax-control balances.

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

Where to find it

Back Office → Muhasib Financials → Tax Summary Report.

Review the Tax Summary Report

Step 1: Set company/registration/date/tax filters

Step 2: Generate the report

Step 3: Review taxable value and tax by category

Step 4: Confirm input/output, return, withholding, and other signs

Step 5: Compare with detailed Tax Report/Summary

Step 6: Reconcile each category to its ledger account

Check your work

Category totals equal non-overlapping detailed tax rows and account balances, subject to documented adjustments.

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

If something goes wrong

- Check tax date versus document date.
- Do not combine registrations or categories with different statutory treatment.

Related guides

- Review the Tax Report
- Review the Detailed Tax Summary Report
- Review Tax Transactions and Summaries

What to do next

> **Review the Tax Report**.

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