# 16.10. Options (standard reasons)

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In a synced system, Options must be added on the **central server** and will then sync to other sites where they will apply to all stores on each site.

You can create a list of options (or reasons) for the user to select from when they perform certain actions in mSupply (in drop down lists etc.). Options are an alternative to the user typing free text, and can help standardise information being recorded in mSupply, which facilitates reporting.

You can enter options for:

- **Requisition Line Variance:** Reasons for a variation between the suggested quantity and entered quantity in a requisition line.
- **Positive Inventory Adjustment:** Reasons for a positive adjustment between the snapshot quantity and entered quantity in a stocktake line (to help answer the question *why is there more stock than expected?*).
- **Negative Inventory Adjustment:** Reasons for a negative adjustment between the snapshot quantity and entered quantity in a stocktake line (to help answer the question *why is there less stock than expected?*).
- **New Cash Out Transaction:** Reasons for a cash out transaction (taking cash out of the cash register).
- **Open vial wastage:** Reasons for open vial wastage when dispensing vaccines (see the mSupply mobile user guide for details).
  - **Closed vial wastage:** Reasons for closed vial wastage when handling vaccines in Open mSupply.

# **Creating options**

1. Go to the Admin tab on the Navigator and click the Preferences button:



2. Click on the *Options* tab in the list on the left hand side to see this page:

	Preferences	
Reports		
Names	Negative inventory adjustment	
lender		Add option
Reminders		
Patient Medication	Option	Active
Drug Interactions		
Registration		
Printing		
DK and print		
090		
Dispensary mode		
65		
og		
Backup		
Backup 2		
Email		
ierver		
iynchronise		
Customization		
Moneyworks		
FrontlineSMS		
LMIS		
DAP		
DHI52		
itock		
Custom fields		
tarcode scanning		
Options		Cancel OK

3. Select the transaction type requiring options from the dropdown list at the top. When you do that, the table will show all the existing options for that type.

4. Click the **Add Option** button and this window will open:

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Туре	Negative inventory	adjustment	0
Option	Expired		
Active		Cancel	ок

5. Enter a name for the option in the **Option** field, then click on the **OK** button to save it.



All options in use have the **Active** box ticked and will now appear for selection in the given transaction type.

If an option is no longer in use, find it in the list, double-click on it and uncheck the **Active** checkbox. This will remove it from the list of options available for a user to select.

This is what the list looks like with some active and some inactive options:

	Preferences	
Reports Names	Negative inventory adjustment	•
Tender	······································	Add option
Reminders		
Patient Medication	Option	Active
Drug Interactions	Expired	
Registration	Damaged	
Printing	Lost	
OK and print		
lono		
Dispensary mode		
Lispensary mode		
lon		
Bashura		
Backup 2		
Backup z		
Email		
Server		
Synchronise		
Customization		
Moneyworks		
FrontlineSMS		
eLMIS		
LDAP		
DHIS2		
Stock		
Custom fields		
Barcode scanning		Orent Office
Options		Cancel OK

## **Using options**

This section shows how options appear in each transaction type after they are created.

### **Requisition line variance**

This type appears when creating a Requisition.

If there are any active options of this type, when a user enters a **User Requested Quantity** that is different from the **Calculated Quantity**, the list of active *Requisition line variance* options automatically appears in the **Reason** column and one must be selected:

Name Order date	Central Medical Store 23/10/19 Black df from master list Delete line(s)	CMS Filter	items Filter	E Referen Comm Max M Threshold M Threshold M	nter new ent 05 3.0 05 0.0 ne or code	Hide stock	k over thresh	aid	Print	ID : 8 Status : nw Type : nequest Entry date : 23/10/19 Entered by : user 1 (pass= u Store: General Wareho
Li Item code	Rem name	Unit	Our stock on	Average monthly consump	Months of stock	Calculated quantity	User requested quantity	Reason		Comment
1 amo500t 2 chip150t	Amoxicilin 500mg tab/cap Chloroquine phos150mg (base) tab	ea ea	hand 4000 500	0	0	0	5000	Replenishing expired stock Enter reason for variati Outbreak Replenishing expired sto	ion: ick	
ve Sort order								Cancel		OK & Next OK

## Positive or negative inventory adjustment

When any active options of these two types are available, they are used in a stocktake (see the 4.17. Stocktakes page) or when manually creating inventory adjustments (see 4.19. Inventory adjustments).

#### Stocktakes

In the main stocktake window, if the **Enter Quantity** value is adjusted to be different from the **Snapshot Quantity** value like this, for example:



then the edit stocktake line edit window is automatically opened and you must select an option from the **Adjustment reason** drop down list:

Item ARTEMETHER	t injection 20mg/ml 2ml	Amp		Black
		Total st	tock for this item : 240	)
Snapshot quantity	40			
Stock take qty	50	Adjustment reason	Please select a reaso	n. 🖸
Pack size	6	Location	None	5
Batch	AAN146010	Cost price	1.00	12 month average
Expiry date	30/11/2018	Sell price	1.00	
Comment				
Donor	None			

If you click on the OK button before selecting a reason you'll be prompted to choose one:



Of course, the same is true if you double-click on a line in the main stocktake window and edit the **Stock take qty** value to be different from the **Snapshot Quantity** in the stock take line edit window; you must select a reason from the **Adjustment reason** drop down list before you can proceed.

If the *Counted quantity* is greater than the **Snapshot quantity** the **Adjustment reason** drop down list is populated with *Positive inventory adjustment* options, if it is smaller then it will be populated with *Negative inventory adjustment* options.

Any reasons entered on a stocktake are carried through to the corresponding inventory adjustment lines that are created when the stocktake is finalised.

#### Inventory adjustments

If there are any active *Positive inventory adjustment* type options, you must select one of them from the **Adjustment reason** drop down list when adding a line to an Inventory adjustment - add stock transaction and they will appear in the **Adjustment reason** column:

	Inve	entory adjust- add stock	
Name Inventory adjust- add stock	1	Confirm date : 00/00/00	Colour Black
Their ref	invad		Invoice number : 0
Comment	4	Category None 0	Entry date : 12/06/2020
	Ad	d/edit inventory adjustment line	Contrast inter
New line Delete I	Item Received quantity 0	Sent quantity 0	New item New item y : Sussel
	Pack size 1	Quan per inner Adjustment reason Please select a r	e: General store
	Total quantity: 0	inners per Outer	
Lo Item code	Batch	Location	Adjustment reason
	Expiry 00/00/00	Volume per pack	m3 😘
	ferral as the section of the section	Adjusted local cost % Margin Sell price	
	(GBP)	0.00 0.0000	
	Price extension (GBP) 0.00	Donor	
		Cancel OK C	DK & Next
Other charges			
S 🛐 🐔 Remisi:			Subtotal: 0.00
Amount	0.00		Total: 0.00
Hold Export batch: 0 Finalise Margin: 0.00		OK & Next	Delete OK 🛛

If there are any active *Negative inventory adjustment* type options, you must select one of them from the **Adjustment reason** drop down list when adding a line to an Inventory adjustment - reduce stock transaction:

Name Inv	entory ad	ljust- redu	ce stock		Ļ				Confi	m date : 0	0/00/00			Colour	Black	
Comment				1	vad				Category	None		0		Entry date : 1 Status : n	2/06/2020 w	
							Add iten	n						ds received ID : 0		
lter Line	ARTEM	ETHER injec	tion 20mg/m	si 2mi A	mp Adjustn	ient reaso	n (Please	select a r	•	5508044		New ite	m	hase Order ID : 0 Requisition ID : 0 Entered by : S	ussal	
Quar Pad	i	0 of 0 0 Ampoul	e	Bulk/	Outer pa	ck size	0							Adjustm	ent reason	
Line 1	Issue	Available 0 0	Tot in st 40	Pack 6	Hold	Bat	ch N146010	Expdate 30/11/2018	Supplier invad	Donor	Location	Cost Price	Sell p			
F																
_	Total o	pantity iss	red ible	0					Cano	ы ) (	ОК	ОК	& Next			
		Other c	harges					-	-			-	-		aut.	
i 🖪 🖸		Iten	n(s):											0.50	tax:	0.00
		Amo	unt	0.0	0									Тс	tal:	0.00
old	Бқ	ort batch: Margin:	0										last	Delete	OK	

### New cash out transaction

When creating a new cash out transaction (see the Cash Out section for details), if there are any active *New cash out transaction* type options then you must select a reason from the **Option** dropdown list that is displyed in the window:

• • •	Add cash transaction	
A	Invoice Number	1
Copy ID to	Entered by	Admin
Clipboard	Entry date	18/07/19
	Confirm date	
Name		
Alders Store		
ALD		<u> </u>
Transaction type		
Cash out		0
Amount		10
Option		_
Refund		<b>C</b>
Description		
New cash register USD	balance:	0
	Cancel	ОК

### **Payment type**

When entering payments on a prescription (see the 11.03. Prescription payments and credits page for details), if there are any active *Payment type* options then you must select one from the drop down list in the *Payment details* section on the *Payment* tab of the prescription before a payment can be saved:

ew Patient	Name P Code: T	atient, Test estp01		ł	Da	le of birth : 23/11/1974 Address :	Female	Store: AKPE	Black SSEKRO (CSR-D PUBL /2020
Prescriber , Code:			Pre	Confirm date : scription date	04/06/2020 04/06/2020			Invoice 431 Entered by Susse	si
ems Payment									
Other details					. i	To Pay		Invoice total	300.00
Other details	will be aut	matically finalised if	a payment is entered	L		fo Pøy		Invoice total	300.00
Other details	will be auto	matically finalised if	a payment is entered			fo Pay		Invoice total Total to pay	300.00
Other details	Cheque : Not	matically finalised if	a payment is entered	_		Patient's credit status Current balance	100.00	Invoice total	300.00
Other details	Cheque : Not	matically finalised if	a payment is entered			ro Pay Patient's credit status Current balance Credit limit	100.00 100.00	Invoice total Total to pay Available credit	300.00 309 100.00
Other details	Cheque : Not	matically finalised if	a payment is entered			Patient's credit status Current balance Credit imit Payment details	100.00 100.00	Invoice total Total to pay Available credit	300.00 309 100.00
Other details	Cheque : Not	matically finalised if	a payment is entered			Patient's credit status Current balance Credit imit Payment details	100.00 100.00	Invoice total Total to pay Available credit Amount paid by credit	300.00 309 100.00 50.00
Other details	Cheque : Not	matically finalised if	a payment is entered			Patient's credit status Current balance Credit limit Payment details	100.00 100.00	Invoice total Total to pay Available credit Amount paid by credit mount paid by patient Total payment	300.00 300 100.00 50.00 250.00 250
Other details	Cheque : Not	matically finalised if	a payment is entered			Patient's credit status Current balance Credit limit Payment details Select the payment type	100.00 100.00	Invoice total Total to pay Available credit Amount paid by credit mount paid by patient Total payment Amount given	300.00 306 100.00 50.00 250.00 250.00 250
Other details	Cheque : Not	matically finalised if i	a payment is entered			Patient's credit status Current balance Credit limit Payment details Select the payment type	100.00 100.00 A	Invoice total Total to pay Available credit Amount paid by patient Total payment Amount given Change to give back	300.00 300 100.00 50.00 250.00 250 0

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