

## 15.10. Options (standard reasons)

You can create a list of options (or reasons) for the user to select from when they use 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.

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.

### Creating options



In a sync system, Options must be added on the **central server** and will then sync to other sites.

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:



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:

A screenshot of a dialog box titled 'Options' for the transaction type 'Negative inventory adjustment'. The 'Option' field contains the text 'Expired'. The 'Active' checkbox is checked. There are 'Cancel' and 'OK' buttons at the bottom right. Red boxes highlight the 'Option' field and the 'OK' button.

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



**Once an option is saved, it *cannot* be deleted.** Check carefully before pressing OK! If you need to prevent an option being available for selection by users then make it inactive. This will mean old options can be displayed correctly in historical records but they are no longer available for use by users.

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:

A screenshot of the 'Preferences...' dialog box. On the left is a sidebar with a list of categories: Reports, Names, Tender, Reminders, Patient Medication, Drug Interactions, Registration, Printing, OK and print, Logo, Dispensary mode, HIS, Log, Backup, Backup 2, Email, Server, Synchronise, Customization, Moneyworks, FrontlineSMS, eLMIS, LDAP, DHIS2, Stock, Custom fields, Barcode scanning, and Options (which is selected). The main area shows a table for 'Negative inventory adjustment' with columns 'Option' and 'Active'. The table contains three rows: 'Expired' with a checked 'Active' box, 'Damaged' with a checked 'Active' box, and 'Lost' with an unchecked 'Active' box. A red box highlights the 'Active' column. There is an 'Add option' button with a plus icon in the top right. 'Cancel' and 'OK' buttons are at the bottom right.

Option	Active
Expired	<input checked="" type="checkbox"/>
Damaged	<input checked="" type="checkbox"/>
Lost	<input type="checkbox"/>



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

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 and edit the **Stock take qty** value to be different from the **Snapshot Quantity**; 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.

## New cash out transaction

### When creating a new **Cash Out** transaction:

A reason must be selected from the **Option** dropdown list.

**Add cash transaction**

Copy ID to Clipboard

Invoice Number: 1

Entered by: Admin

Entry date: 18/07/19

Confirm date:

Name: Alders Store

ALD

Transaction type: Cash out

Amount: 10

Option: Refund

Description:

New cash register balance: USD 0

Cancel OK

## Payment type

When creating a **Prescription** in a dispensary where you receive payments:

An option must be selected from the **Payment Type** dropdown list when confirming the payment.

**Prescription Entry**

**Patient details**

Name: Patient, Test Date of birth: 23/11/1974 ☐ Female  
 New Patient Code: Testp01 Address:   
 Store: AKPESSEKRO (CSR-D PUBLIC)  
 Entered: 04/06/2020  
 Invoice: 431  
 Entered by: Sussel

Prescriber:   
 Confirm date: 04/06/2020  
 Prescription date: 04/06/2020

**Items: Payment**

**Other details**

This invoice will be automatically finalised if a payment is entered.

Cheque #:   
 Note:   
 To Pay

Invoice total: 300.00  
 Total to pay: 300

**Patient's credit status**

Current balance	100.00	Available credit	100.00
Credit limit	100.00		

**Payment details**

Amount paid by credit: 50.00  
 Amount paid by patient: 250.00  
 Total payment: 250  
 Amount given: 0  
 Change to give back: 0

Select the payment type

☐ Finalise Export batch: 0 Status: on ☐ Print receipt OK & Next Delete OK

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