

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

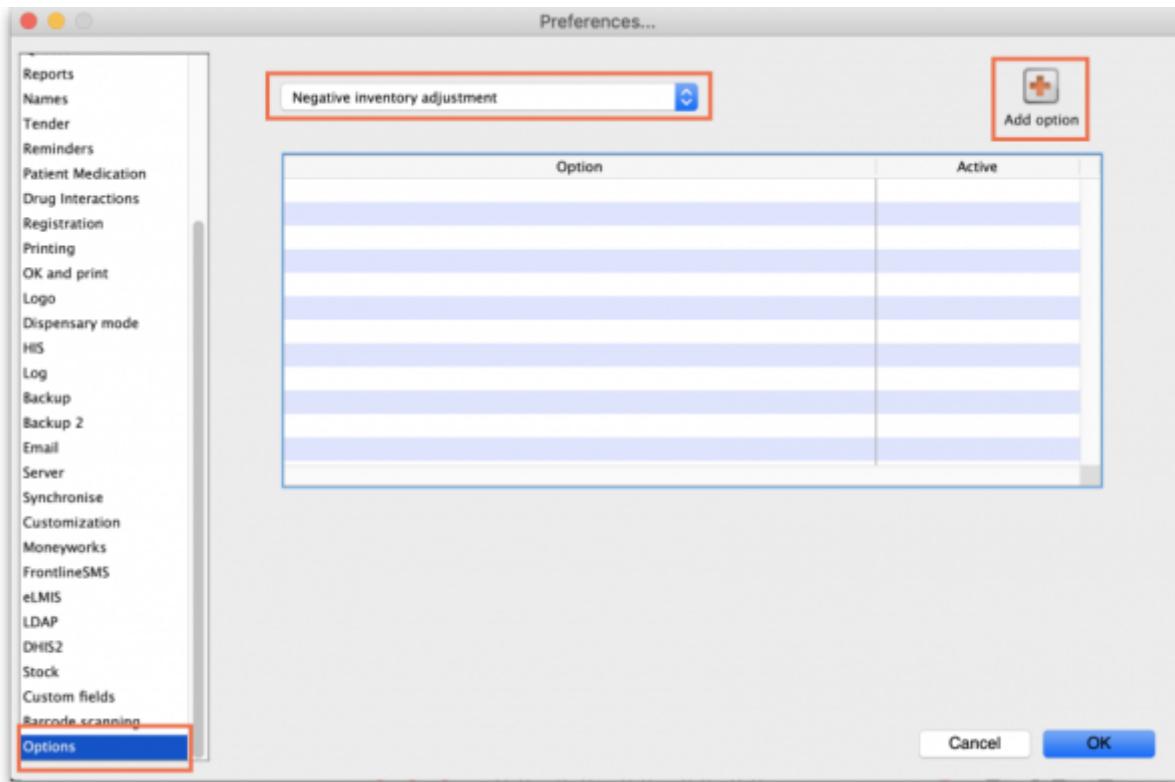


In a sync system, Options must be added on the **central server** and will then sync to other sites.

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

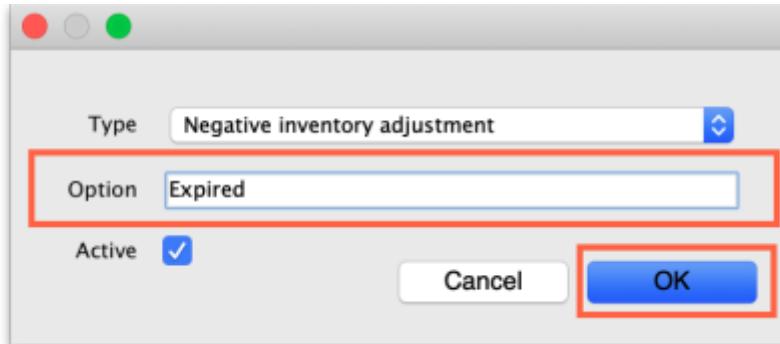


2. Click on the *Options* tab in the list on the left hand side to see this page:

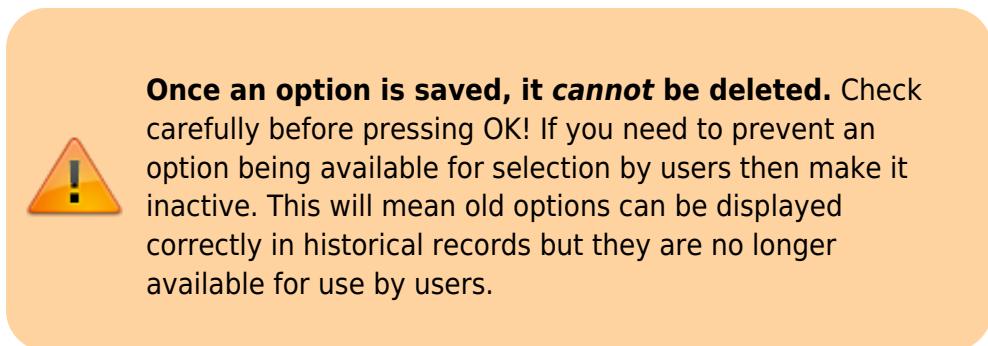


3. Select the transaction type requiring options from the dropdown list at the top. When you do that, the table will show all the existing options for that type.

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



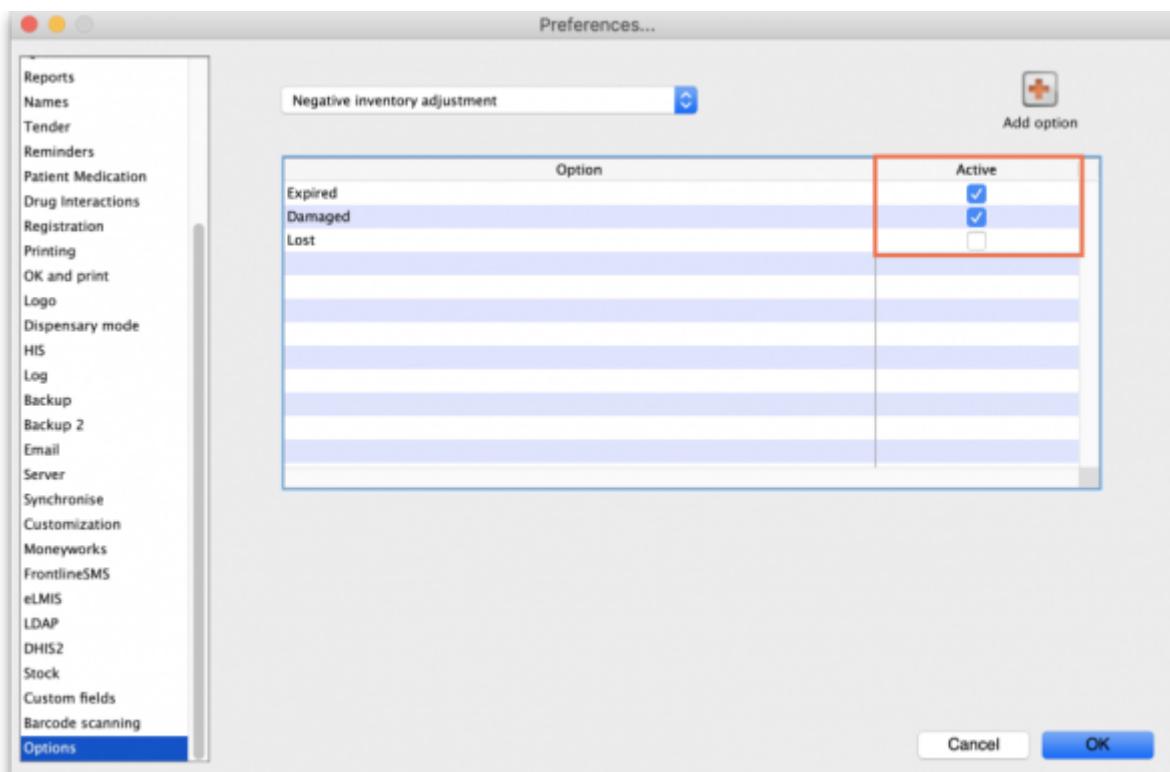
5. Enter a name for the option in the **Option** field, then click on the **OK** button to save it.



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:



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:

The screenshot shows a Mac OS X style application window titled 'Enter new requisition...'. The window has various fields at the top: 'Name: Central Medical Store', 'Order date: 23/10/19', 'Status: Black', 'Reference', 'Comment', 'Max MOS 3.0', 'Threshold MOS 0.0', 'Hide stock over threshold', 'Print', 'Entered by: user 1 (passive user)', 'Entry date: 23/10/19', and 'Store: General Warehouse'. Below these are buttons for 'New line', 'Add from master list', 'Delete line(s)', and 'Filter items'. A 'Data entry' tab is selected. The main area is a table with columns: 'Li...', 'Item code', 'Item name', 'Unit', 'Our stock on hand', 'Average monthly consump...', 'Months of stock', 'Calculated quantity', 'User requested quantity', 'Reason', and 'Comment'. Two rows of data are visible: 1. amo500t, Amoxicilline 500mg tab/cap, ea, 4000, 0, 0, 0, 0, 5000, 'Replenishing expired stock'. 2. chl150t, Chloroquine phos... 150mg (base) tab, ea, 500, 0, 0, 0, 0, 2000. A red box highlights the 'Reason' column for the second row, showing a dropdown menu with the options 'Enter reason for variation:', 'Outbreak', and 'Replenishing expired stock'. At the bottom of the window are buttons for 'Save Sort order', 'Finalise', 'Cancel', 'OK & Next', and 'OK'.

Positive or negative inventory adjustment

When any active options of this type 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:

Stock take sheet...

Description	12/06/2020 Stocktake	Stock take number	21
Comment		Stock take entered date	12/06/2020
Stock take date	12/06/2020	Stock take status	sg

Search by item name and code

Location	Item code	Item name	Batch	Expiry	Snapshot quantity	Pack Size	Enter Quantity	Adjustment reason	Comment
SS08044		ARTEMETHER injection 20mg/ml 2ml Amp	AAN146010	30/11/2018	40	6	50		
SS08043		ARTESUNATE + AMO...O pre-qualified FDC	CYX086008	30/04/2018	800	75	800		
SS08043		ARTESUNATE + AMO...O pre-qualified FDC	CYX96020	30/11/2018	25	75	25		
SS08042		ARTESUNATE + AMO...O pre-qualified FDC	CYY307003	31/12/2018	25	75	25		

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

Stock take line edit...

Item ARTEMETHER injection 20mg/ml 2ml Amp		Black
Total stock for this item : 240		
Snapshot quantity	40	Adjustment reason <input type="button" value="Please select a reason."/>
Stock take qty	50	
Pack size	6	Location <input type="button" value="None"/>
Batch	AAN146010	Cost price 1.00 <input type="checkbox" value="12 month average"/>
Expiry date	30/11/2018	Sell price 1.00
Comment		
Donor	None	

Cancel OK OK & Next

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



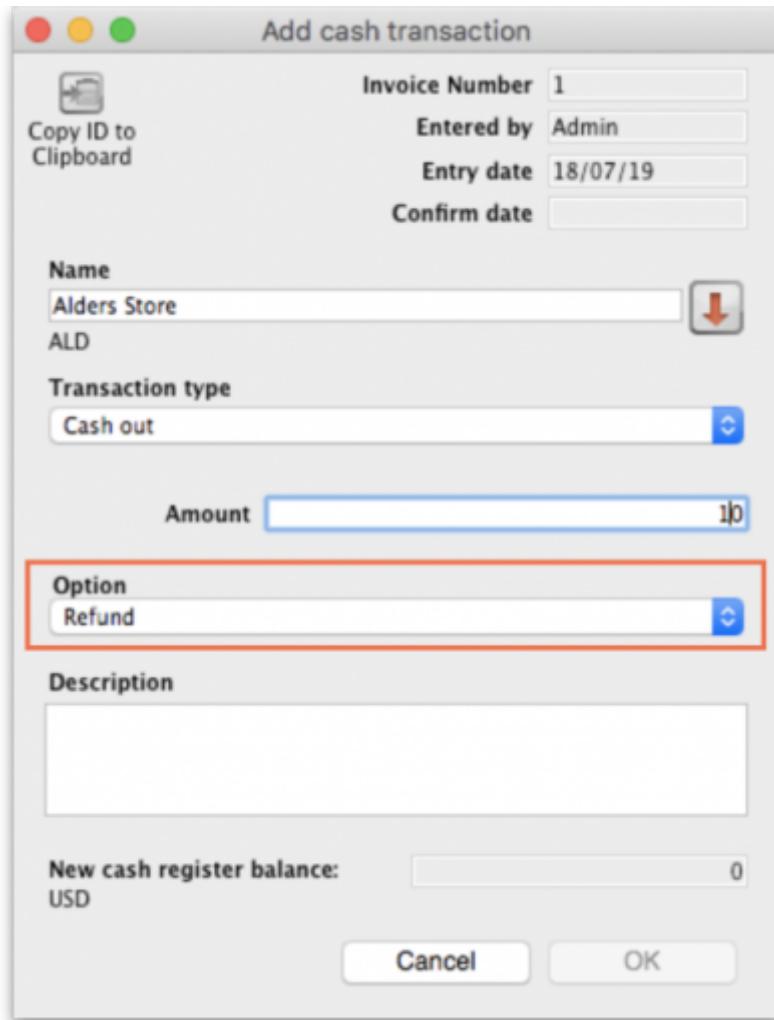
Of course, the same is true if you double-click on a line and edit the **Stock take qty** value to be different from the **Snapshot Quantity**; you must select a reason from the **Adjustment reason** drop down list before you can proceed.

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.



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

<input type="button" value="New Patient"/>	Name: Patient, Test	<input type="button" value=""/>	Date of birth: 23/11/1974	<input type="checkbox"/> Female
Code: Testp01	Address:	Store: AKPESSEKRO (CSR-D PUBLIC)		
Prescriber:	Confirm date: 04/06/2020	Entered 04/06/2020		
Code:	Prescription date: 04/06/2020	Invoice 431		
Entered by: Sussol				

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	Credit limit	100.00	Available credit	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	

Finalise Export batch: 0 Status: on Print receipt

Previous: [16.09. Barcode scanning preferences](#) | | Next: [16.11. Custom fields](#)

From:

<https://docs.msupply.org.nz/> - mSupply documentation wiki

Permanent link:

<https://docs.msupply.org.nz/preferences:options?rev=1591955345>

Last update: **2020/06/12 09:49**

