

## 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

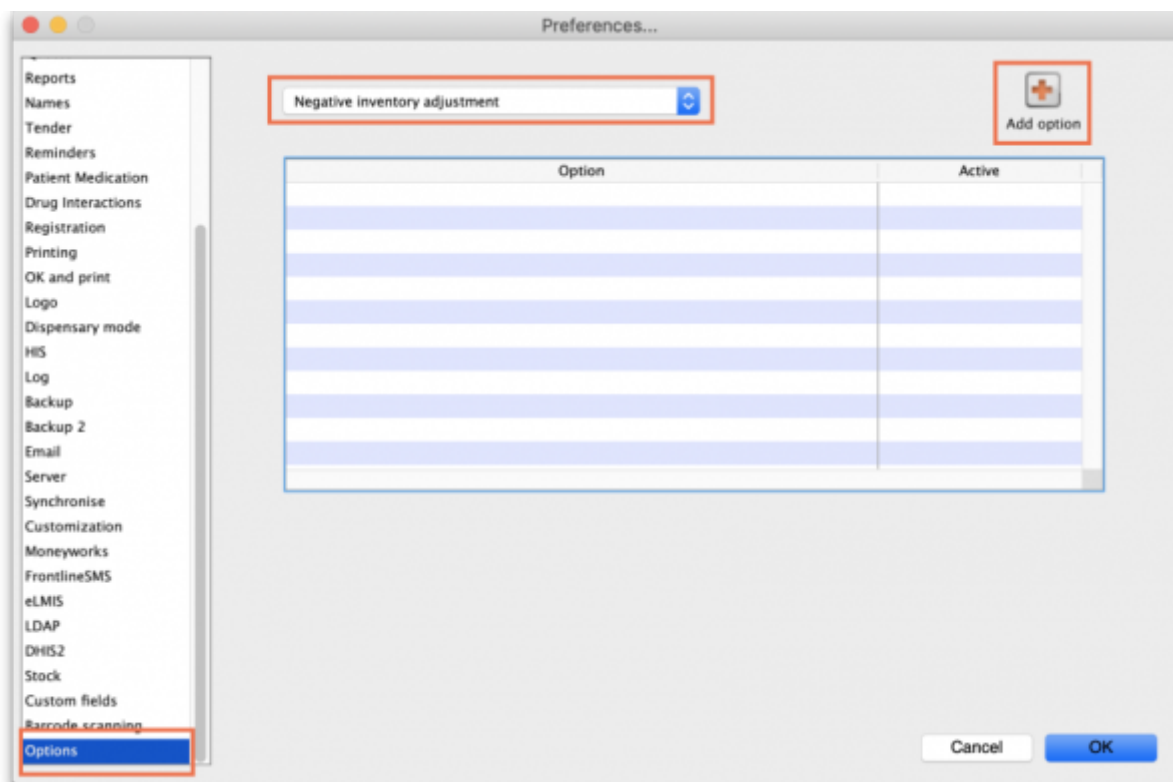


In a sync system, Options must be added on the **central server** and will then sync to other sites.

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' (Active checked), 'Damaged' (Active checked), and 'Lost' (Active unchecked). 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"/>            |



Stock take sheet...

Description: 12/06/2020 Stocktake

Comment:

Stock take date: 12/06/2020

Stock take number: 21

Stock take entered date: 12/06/2020

Stock take status: sg

New line, Delete line(s), Print, Create Inventory adjustments, Order by

Search by item name and code

| Location | Item code | Item name                               | Batch     | Expiry     | Snapsh... | 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 FDCI | CYX086008 | 30/04/2018 | 800       | 75        | 800            |                   |         |
|          | SS08043   | ARTESUNATE + AMO...O pre-qualified FDCI | CYX296020 | 30/11/2018 | 25        | 75        | 25             |                   |         |
|          | SS08042   | ARTESUNATE + AMO...O pre-qualified FDCI | 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

Total stock for this item: 240

Snapshot quantity: 40

Stock take qty: 50

Pack size: 6

Batch: AAN146010

Expiry date: 30/11/2018

Comment:

Donor: None

Adjustment reason: Please select a reason.

Location: None

Cost price: 1.00

Sell price: 1.00

Buttons: Cancel, OK, OK & Next

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

Alert...

Your stocktake quantity is different to your snapshot quantity. Please enter a reason.

OK

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

New Patient

Code: Testp01

Date of birth : 23/11/1974

☐ Female

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

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

OK & Next

Delete


OK

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