

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 the 'Negative inventory adjustment' transaction type. The table has two columns: 'Option' and 'Active'. The 'Option' column lists 'Expired', 'Damaged', and 'Lost'. The 'Active' column has checkboxes: 'Expired' is checked, 'Damaged' is checked, and 'Lost' is unchecked. A red box highlights the 'Active' column. There is an 'Add option' button with a plus icon in the top right. At the bottom are 'Cancel' and 'OK' buttons.

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

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

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:

[illegible]

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](#)).

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

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...

Warning icon

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 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.

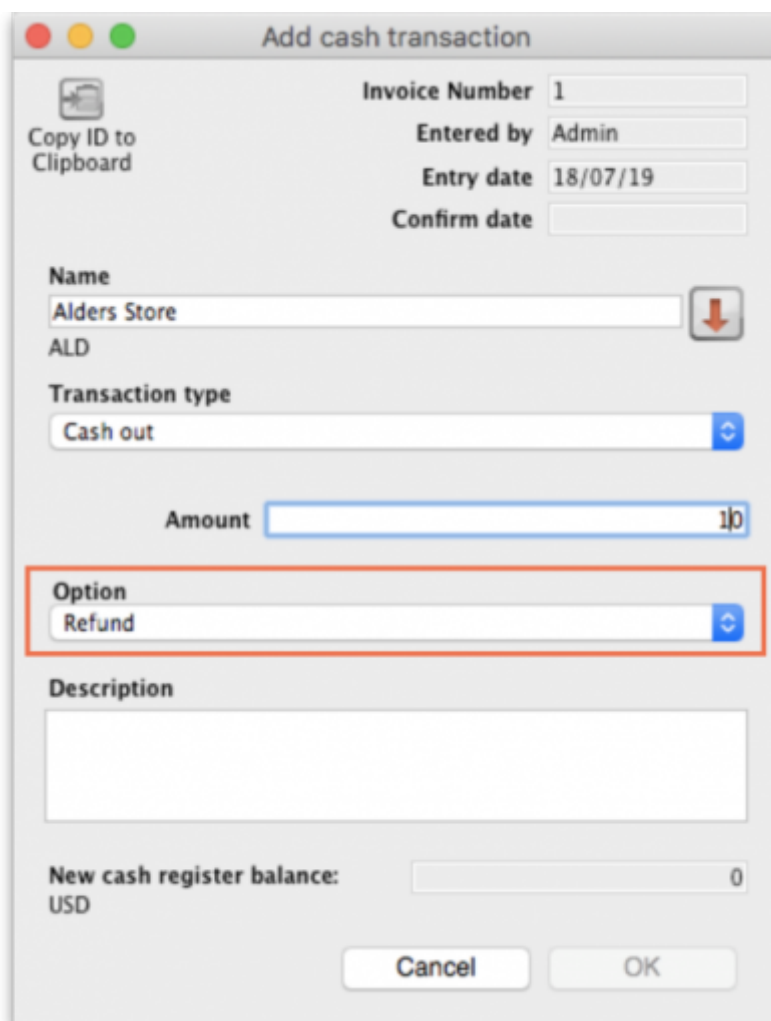
If the *Counted quantity* is greater than the **Snapshot quantity** the **Adjustment reason** drop down list is populated with *Positive inventory adjustment* options, if it is smaller then it will be populated with *Negative inventory adjustment* options.

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

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 displayed in the window:



The screenshot shows a window titled "Add cash transaction". It contains the following fields and controls:

- Copy ID to Clipboard**: A button with a clipboard icon.
- Invoice Number**: A text field containing "1".
- Entered by**: A text field containing "Admin".
- Entry date**: A text field containing "18/07/19".
- Confirm date**: An empty text field.
- Name**: A text field containing "Alders Store".
- Transaction type**: A dropdown menu showing "Cash out".
- Amount**: A text field containing "10".
- Option**: A dropdown menu showing "Refund". This field is highlighted with a red rectangular box.
- Description**: A large empty text area.
- New cash register balance:**: A text field containing "0".
- USD**: A label below the balance field.
- Buttons**: "Cancel" and "OK" buttons at the bottom.

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:

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

Prescription details

Prescriber:

Code:

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	

Select the payment type

Finalise

Export batch: 0

Status: on

Print receipt

OK & Next

Delete

OK

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