

15.10. Options (standard reasons)

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 https://docs.msupply.foundation/en:mobile:user_guide/ for details).

Creating options

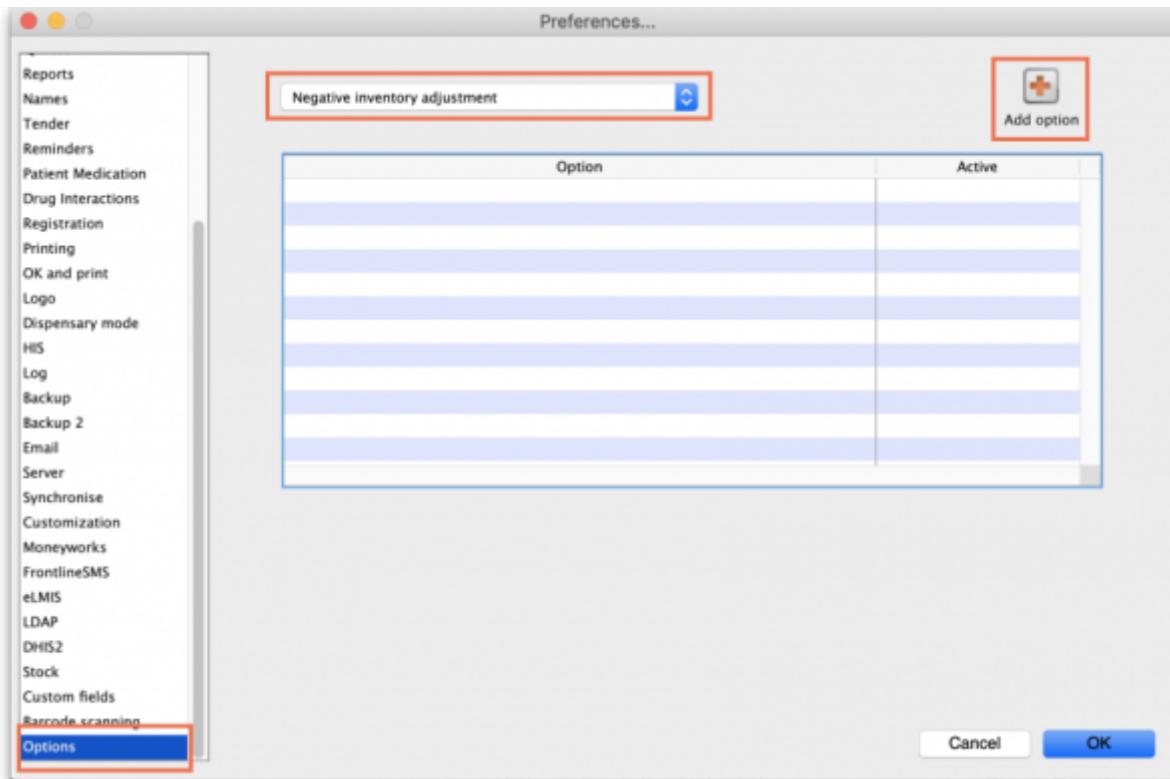


In a sync system, Options must be added on the **central server** and will then sync to other sites.

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

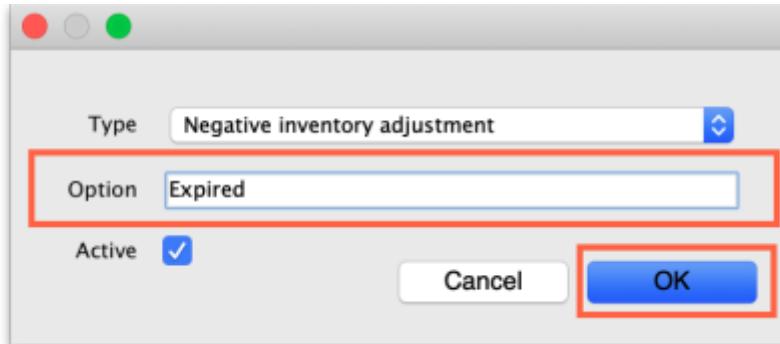


2. Click on the *Options* tab in the list on the left hand side to see this page:

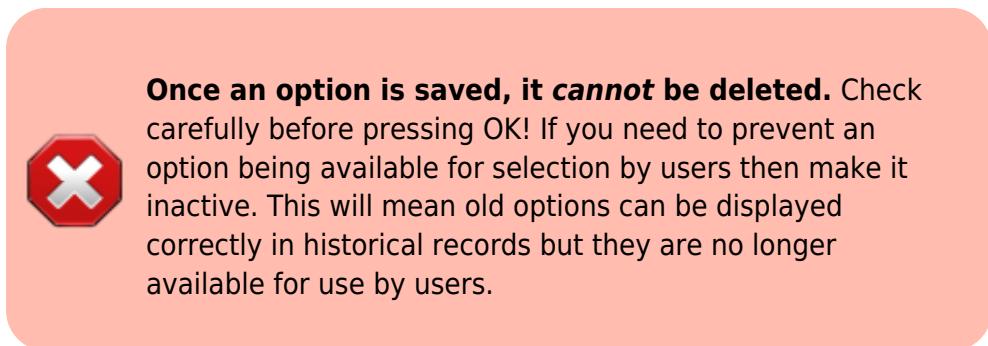


3. Select the transaction type requiring options from the dropdown list at the top. When you do that, the table will show all the existing options for that type.

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



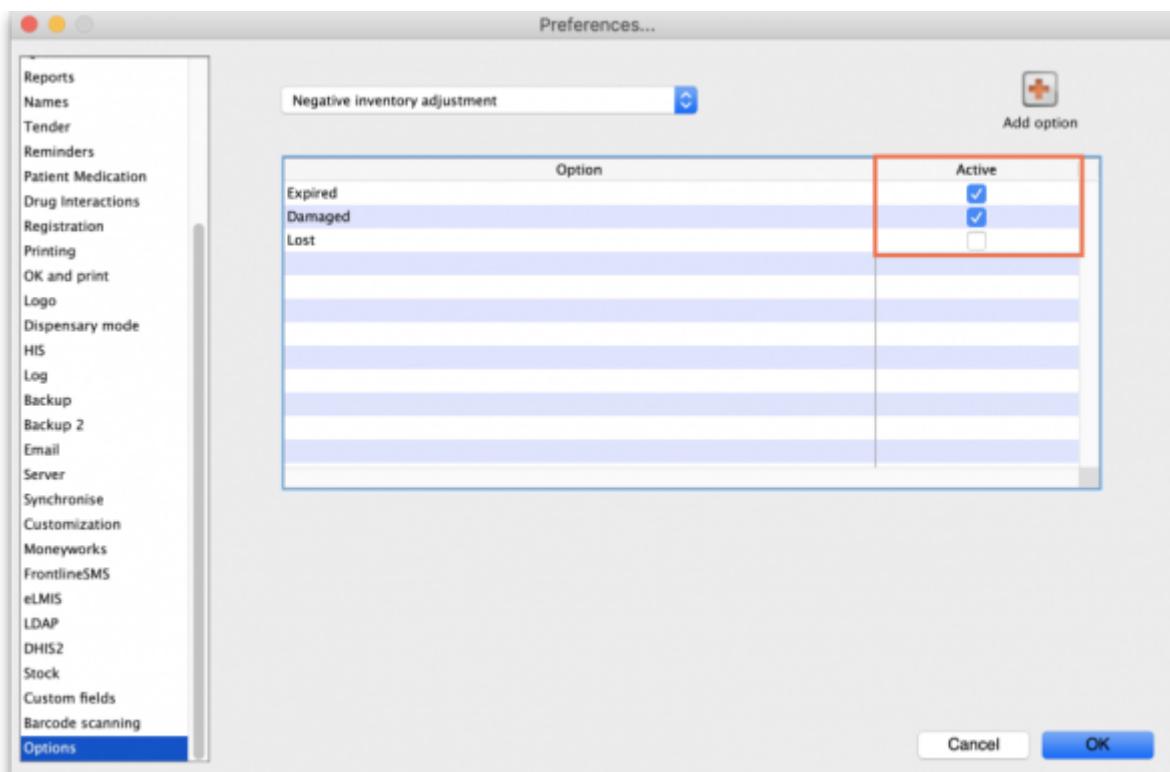
5. Enter a name for the option in the **Option** field, then click on the **OK** button to save it.



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)', 'Filter items', and 'Data entry' (which 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'. There are two rows of data: one for Amoxicillin 500mg tab/cap and one for Chloroquine phos... 150mg (base) tab. The 'User requested quantity' column for the first row is highlighted with a red border. A dropdown menu is open over this cell, containing the text 'Enter reason for variation: Outbreak Replenishing expired stock'. At the bottom of the window are buttons for 'Save Sort order', 'Finalise' (unchecked), 'Cancel', 'OK & Next', and '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:

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	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	CYX296020	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 Total stock for this item : 240

Snapshot quantity 40
Stock take qty 50 Adjustment reason Please select a reason.

Pack size 6 Location None

Batch AAN146010 Cost price 1.00 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:



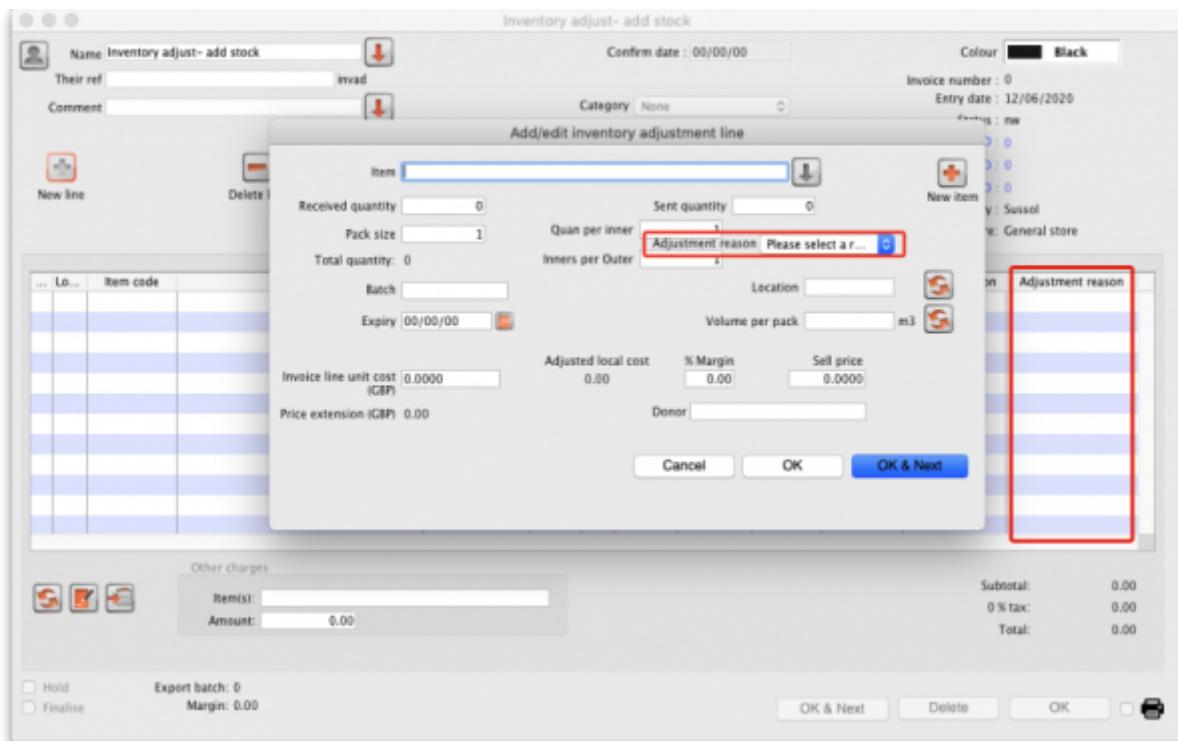
Of course, the same is true if you double-click on a line in the main stocktake window and edit the **Stock take qty** value to be different from the **Snapshot Quantity** in the stock take line edit window; you must select a reason from the **Adjustment reason** drop down list before you can proceed.

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.

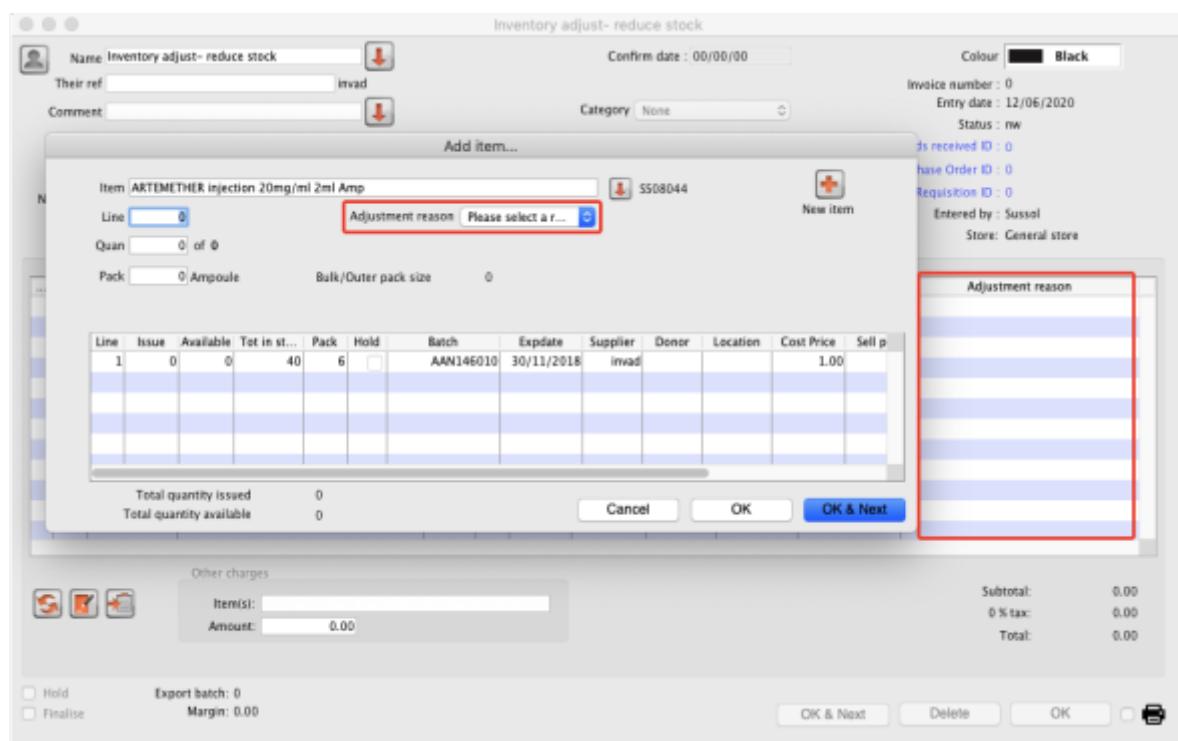
Any reasons entered on a stocktake are carried through to the corresponding inventory adjustment lines that are created when the stocktake is finalised.

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:

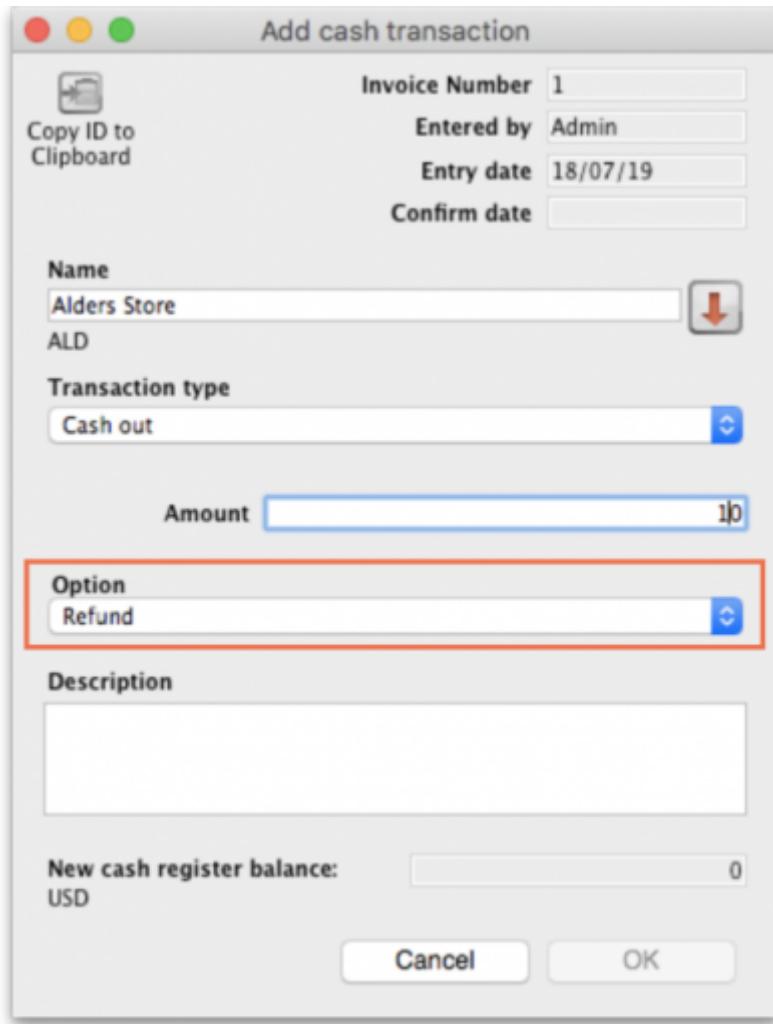


If there are any active *Negative inventory adjustment* type options, you must select one of them from the **Adjustment reason** drop down list when adding a line to an Inventory adjustment - reduce stock transaction:



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:



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

<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
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Payment details

Select the payment type

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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