

16.10. Options (standard reasons)

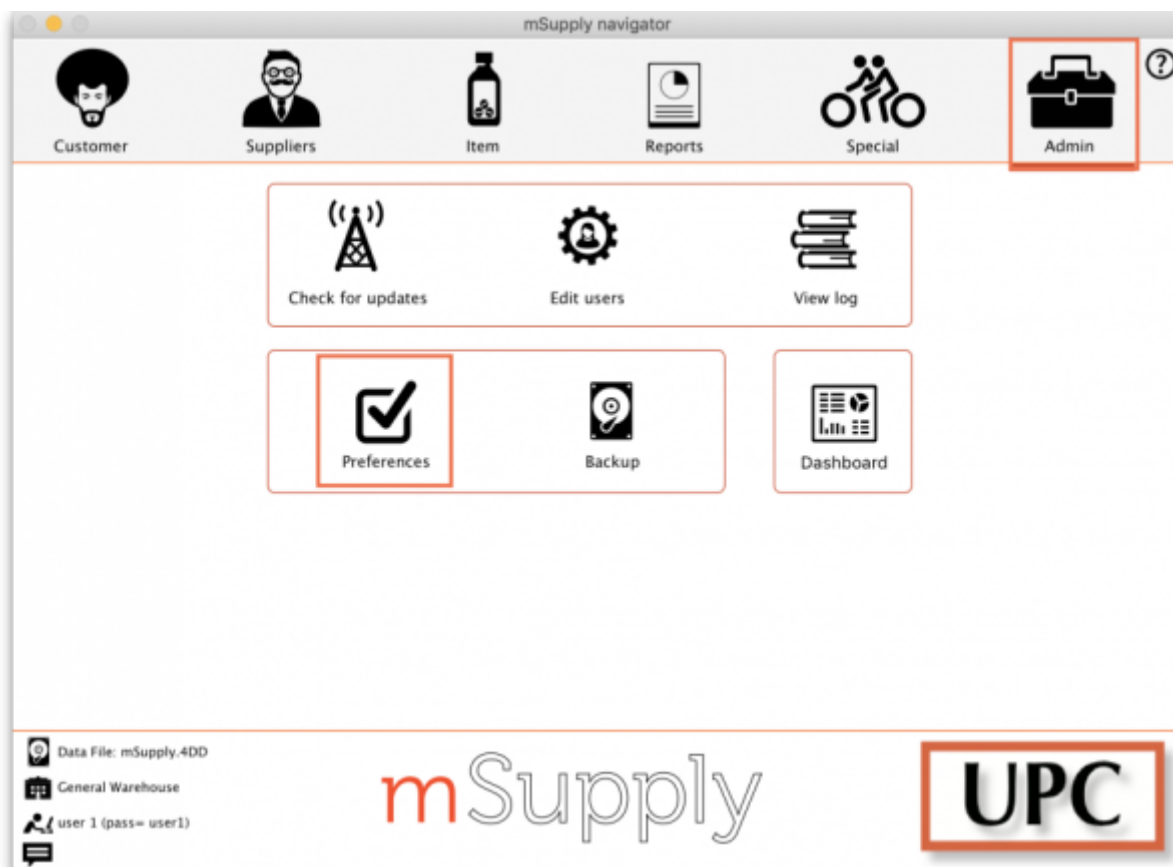
You can create a list of options (or reasons) for the user to select from when they perform certain actions in mSupply (in drop down lists etc.). Options are an alternative to the user typing free text, and can help standardise information being recorded in mSupply, which facilitates reporting.

You can enter options for:

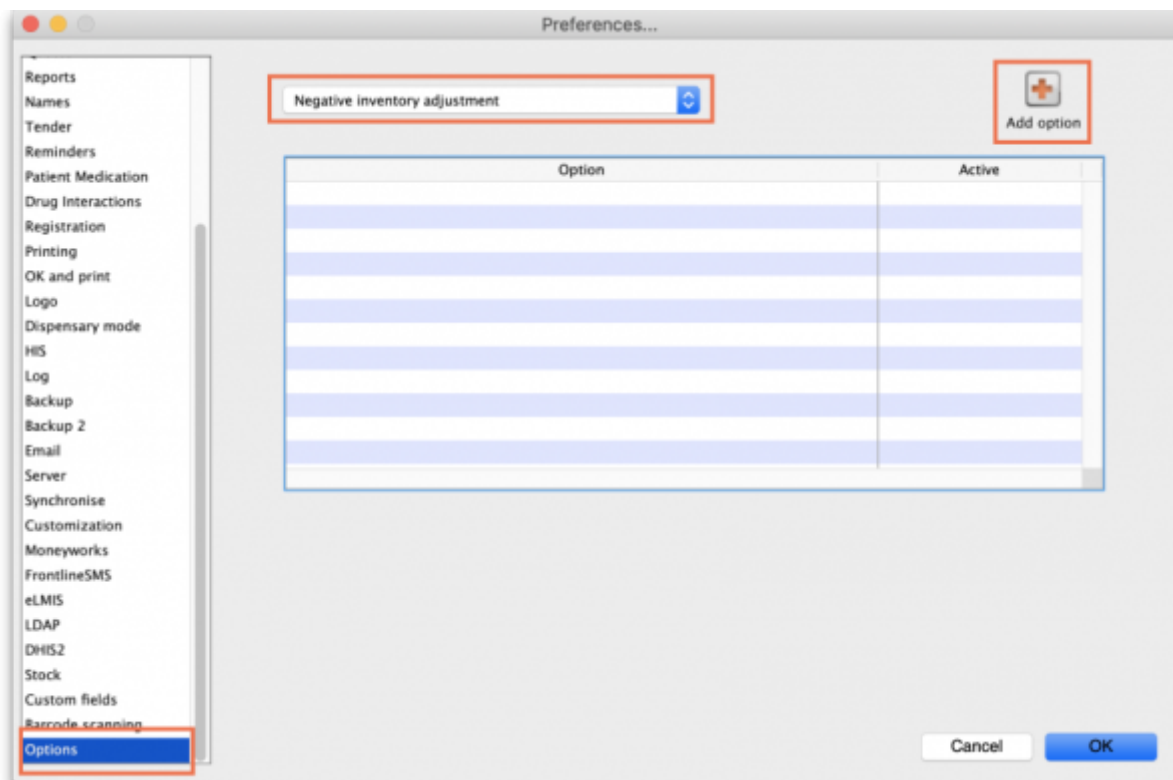
- **Requisition Line Variance:** Reasons for a variation between the suggested quantity and entered quantity in a requisition line.
- **Positive Inventory Adjustment:** Reasons for a positive adjustment between the snapshot quantity and entered quantity in a stocktake line (to help answer the question *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 [the mSupply mobile user guide](#) for details).

Creating options

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

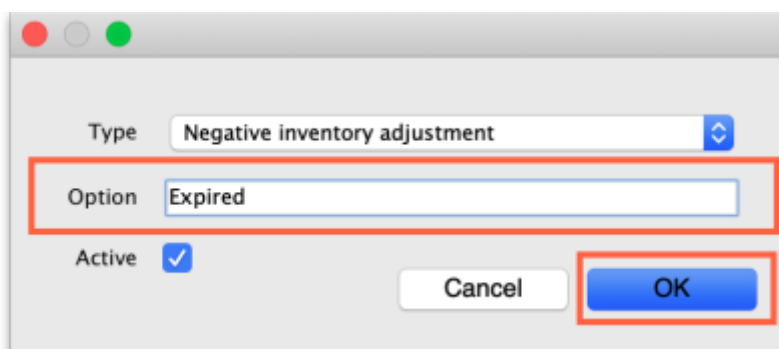


2. Click on the *Options* tab in the list on the left hand side to see this page:



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:

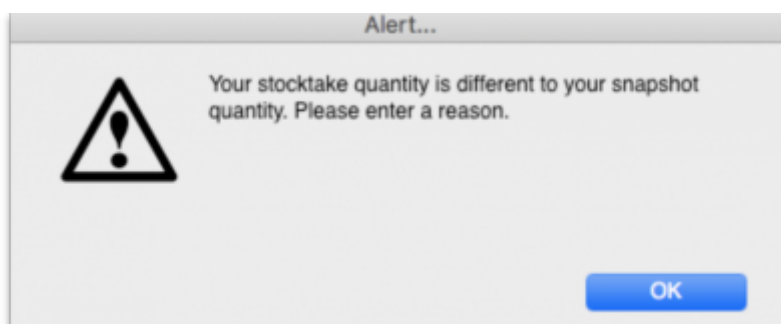


5. Enter a name for the option in the **Option** field, then click on the **OK** button to save it.



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.

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:

Inventory adjust- add stock

Confirm date : 00/00/00

Colour Black

Name Inventory adjust- add stock

Invoice number : 0

Their ref

Entry date : 12/06/2020

Comment

Status : nw

Category None

Invoice number : 0

Entry date : 12/06/2020

Status : nw

Invoice number : 0

Status : nw

Entry date : 12/06/2020

Status : nw

Status : nw

Entered by : Sussal

Store : General store

Entered by : Sussal

Store : General store

Entered by : Sussal

Add/edit inventory adjustment line

Item

Received quantity 0

Sent quantity 0

Pack size 1

Quan per inner 1

Total quantity: 0

Inners per Outer 1

Batch

Location

Expiry 00/00/00

Volume per pack m3

Invoice line unit cost 0.0000

Adjusted local cost 0.00

% Margin 0.00

Sell price 0.0000

Price extension (ICBP) 0.00

Donor

Adjustment reason: Please select a r...

Cancel

OK

OK & Next

Adjustment reason

Other charges

Item(s)

Amount: 0.00

Subtotal: 0.00

0 % tax: 0.00

Total: 0.00

Hold

Finalise

Export batch: 0

Margin: 0.00

OK & Next

Delete

OK

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:

Inventory adjust- reduce stock

Confirm date : 00/00/00

Colour Black

Name Inventory adjust- reduce stock

Invoice number : 0

Their ref

Entry date : 12/06/2020

Comment

Status : nw

Category None

Invoice number : 0

Entry date : 12/06/2020

Status : nw

Status : nw

Entered by : Sussal

Store : General store

Entered by : Sussal

Store : General store

Entered by : Sussal

Add item...

Item ARTEMETHER injection 20mg/ml 2ml Amp

Line 0

Adjustment reason: Please select a r...

Quan 0 of 0

Pack 0 Ampoule

Bulk/Outer pack size 0

SS08044

New item

Line	Issue	Available	Tot in st...	Pack	Hold	Batch	Exdate	Supplier	Donor	Location	Cost Price	Sell p
1	0	0	40	6		AAN146010	30/11/2018	Invad			1.00	

Total quantity issued 0

Total quantity available 0

Cancel

OK

OK & Next

Adjustment reason

Other charges

Item(s)

Amount: 0.00

Subtotal: 0.00

0 % tax: 0.00

Total: 0.00

Hold

Finalise

Export batch: 0

Margin: 0.00

OK & Next

Delete

OK

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:

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 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

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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