

## 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:

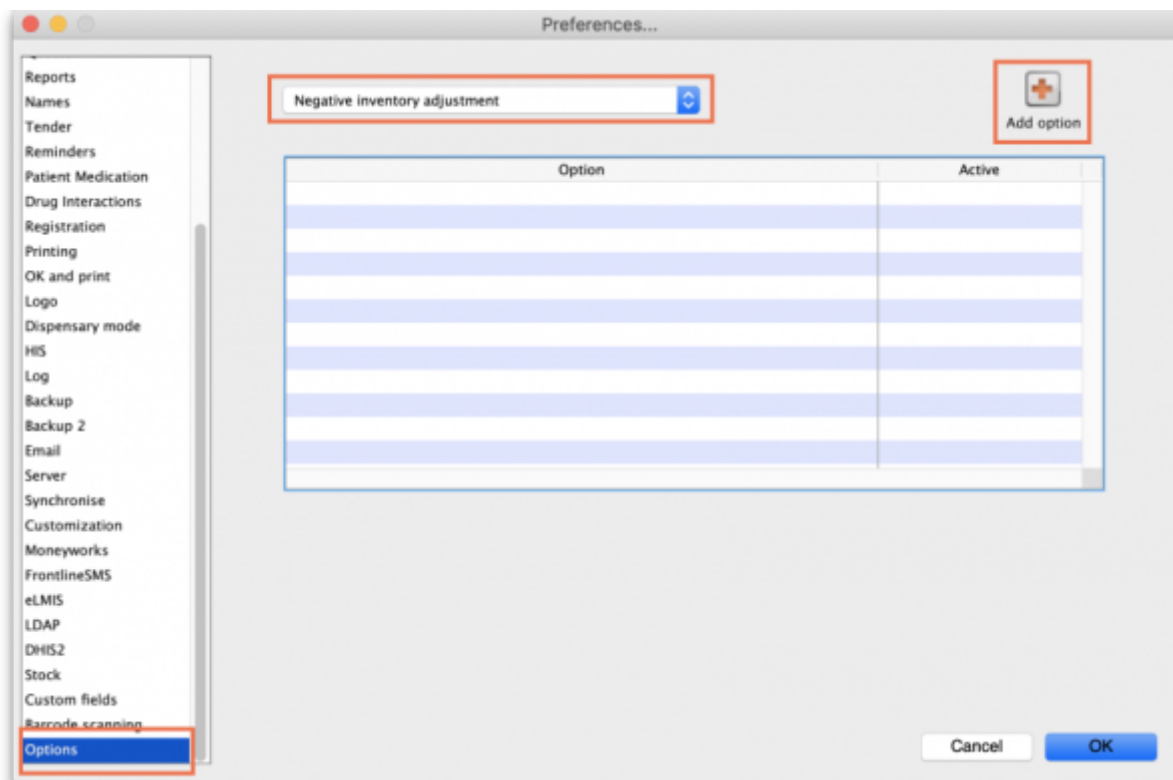
- **Requisition Line Variance:** Reasons for a variation between the suggested quantity and entered quantity in a requisition line.
- **Positive Inventory Adjustment:** Reasons for a positive adjustment between the snapshot quantity and entered quantity in a stocktake line (to help answer the question *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:

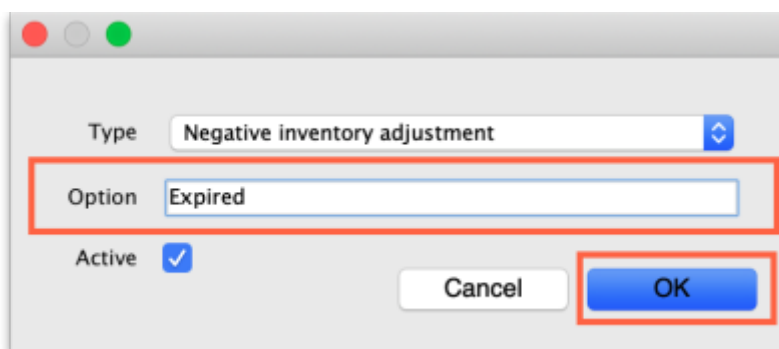


2. Click on the *Options* tab in the list on the left hand side to see this page:



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.

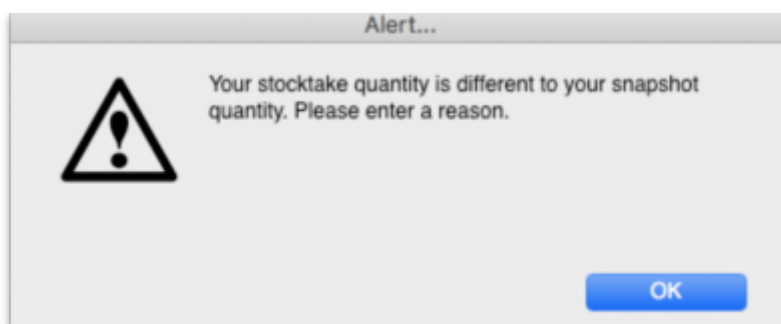


**Once an option is saved, it *cannot* be deleted.** Check carefully before pressing OK! If you need to prevent an option being available for selection by users then make it inactive. This will mean old options can be displayed correctly in historical records but they are no longer available for use 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:

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:

**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:   
 Confirm date: 04/06/2020  
 Code: 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 | Available credit | 100.00 |
| Credit limit    | 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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Last update: **2023/09/02 00:57**

