

## 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:

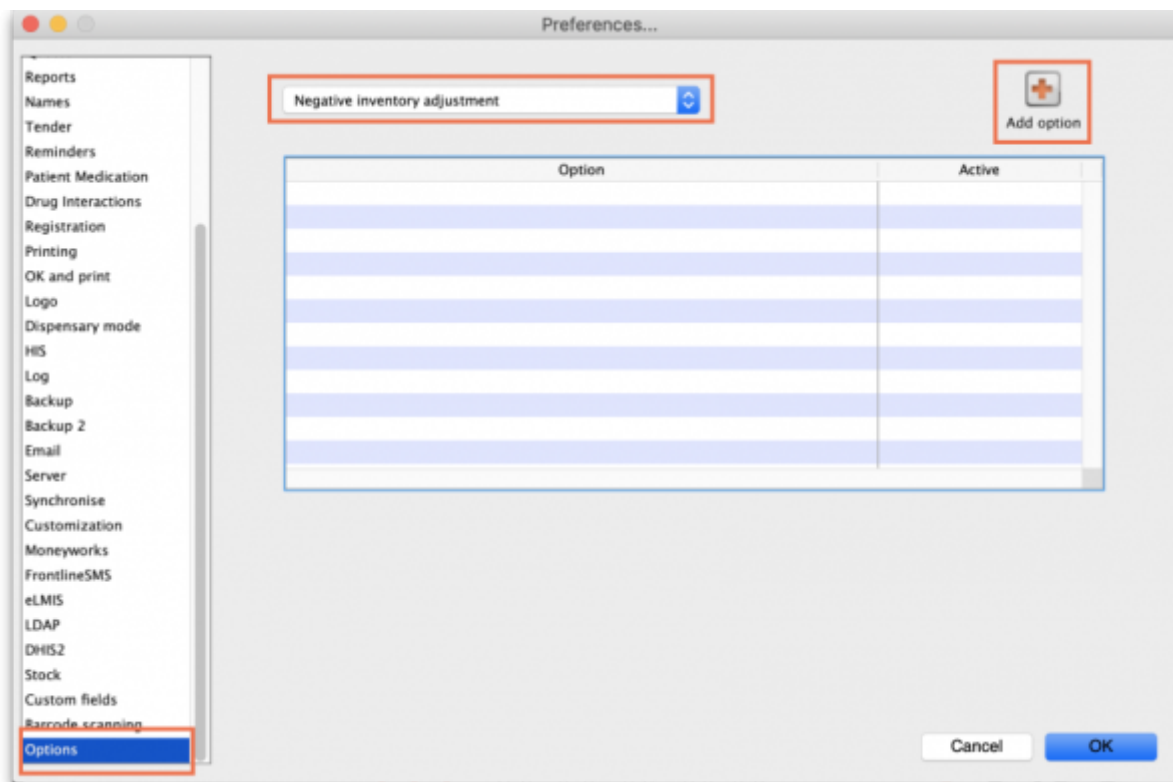
- **Requisition Line Variance:** Reasons for a variation between the suggested quantity and entered quantity in a requisition line.
- **Positive Inventory Adjustment:** Reasons for a positive adjustment between the snapshot quantity and entered quantity in a stocktake line (to help answer the question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

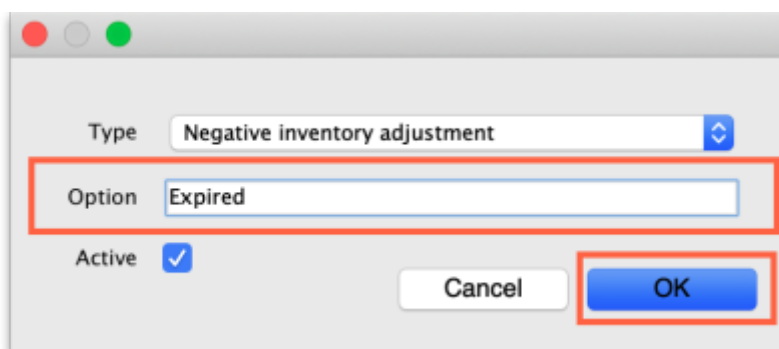


2. Click on the *Options* tab in the list on the left hand side to see this page:



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.



### Positive or negative inventory adjustment

## Stocktakes

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

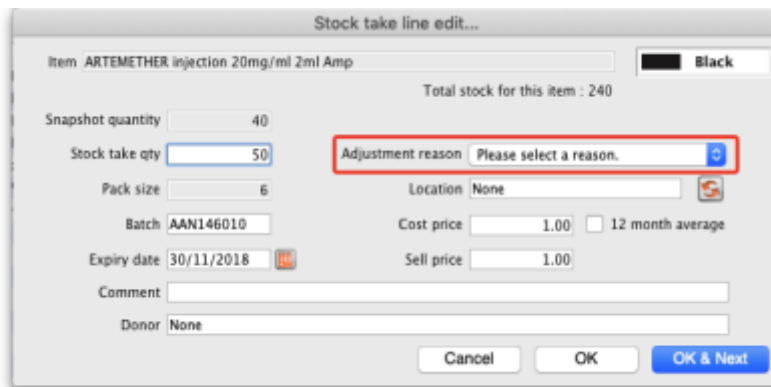
Create Inventory adjustments

Order by

Search by item name and code

Location	Item code	Item name	Batch	Expiry	Snapshot	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 Black

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.

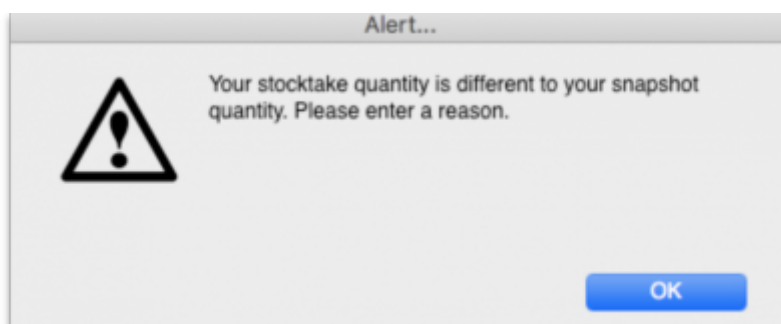
Location: None

Cost price: 1.00 ☐ 12 month average

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:



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

Their ref invad

Comment

Category None

Invoice number : 0

Entry date : 12/06/2020

Colour Black

Invoice number : 0

Entry date : 12/06/2020

Colour Black

Invoice number : 0

Entry date : 12/06/2020

Add/edit inventory adjustment line

Item

Received quantity 0

Pack size 1

Total quantity: 0

Batch

Expiry 00/00/00

Invoice line unit cost (ICBP) 0.0000

Price extension (ICBP) 0.00

Sent quantity 0

Quan per inner 1

Inners per Outer 1

Adjusted local cost 0.00

% Margin 0.00

Donor

Adjustment reason: Please select a r...

Location

Volume per pack m3

Subtotal: 0.00

0 % tax: 0.00

Total: 0.00

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

Their ref invad

Comment

Category None

Invoice number : 0

Entry date : 12/06/2020

Colour Black

Invoice number : 0

Entry date : 12/06/2020

Colour Black

Invoice number : 0

Entry date : 12/06/2020

Add item...

Item ARTEMETHER injection 20mg/ml 2ml Amp

Line 0

Quan 0 of 0

Pack 0 Ampoule

Bulk/Outer pack size 0

Adjustment reason: Please select a r...

Subtotal: 0.00

0 % tax: 0.00

Total: 0.00

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: 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
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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Last update: **2023/09/02 00:57**

