

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 dropdown menu set to 'Negative inventory adjustment'. Below it is a table with two columns: 'Option' and 'Active'. The table contains three rows: 'Expired' with a checked checkbox, 'Damaged' with a checked checkbox, and 'Lost' with an unchecked checkbox. A red box highlights the 'Active' column. At the top right of the main area is an 'Add option' button with a plus icon. At the bottom right are 'Cancel' and 'OK' buttons.

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

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 the 'Enter new requisition...' window. At the top, there are fields for Name (Central Medical Store), Reference, Order date (23/10/19), Comment, Max MOS (3.0), and Threshold MOS (0.0). Below these are buttons for 'New line', 'Add from master list', 'Delete line(s)', and 'Filter items'. 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 is displayed. Line 1: amox500t, Amoxicillin 500mg tab/cap, ea, 4000, 0, 0, 0, 5000, Replenishing expired stock. Line 2: chlp150t, Chloroquine phos...150mg (base) tab, ea, 500, 0, 0, 0, 2000. A dropdown menu is open for the 'Reason' column of line 2, showing options: 'Enter reason for variation;', 'Outbreak', and 'Replenishing expired stock'.

LI...	Item code	Item name	Unit	Our stock on hand	Average monthly consump...	Months of stock	Calculated quantity	User requested quantity	Reason	Comment
1	amox500t	Amoxicillin 500mg tab/cap	ea	4000	0	0	0	5000	Replenishing expired stock	
2	chlp150t	Chloroquine phos...150mg (base) tab	ea	500	0	0	0	2000	Enter reason for variation; Outbreak Replenishing expired stock	

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:

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:

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.

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 has several input fields and a dropdown menu. The "Option" dropdown is highlighted with a red box. The fields are as follows:

- Invoice Number: 1
- Entered by: Admin
- Entry date: 18/07/19
- Confirm date: (empty)
- Name: Alders Store
- Transaction type: Cash out
- Amount: 10
- Option: Refund
- Description: (empty text area)
- New cash register balance: 0

At the bottom, there are "Cancel" and "OK" buttons.

Payment type

When creating a **Prescription in a dispensary where you receive payments:**

An option must be selected from the **Payment Type** dropdown list when confirming the payment.

Prescription Entry

Patient details

Name: Patient, Test | Date of birth: 23/11/1974 | Female | Store: AKPESSEKRO (CSR-D PUBLIC)

New Patient | Code: Testp01 | Address: | Entered: 04/06/2020 | Invoice: 431 | Entered by: Sussel

Prescriber: | 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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