

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 table for the 'Negative inventory adjustment' transaction type. The table has two columns: 'Option' and 'Active'. The 'Option' column lists 'Expired', 'Damaged', and 'Lost'. The 'Active' column shows checkboxes: 'Expired' is checked, 'Damaged' is checked, and 'Lost' is unchecked. A red box highlights the 'Active' column. There is an 'Add option' button with a plus icon in the top right. At the bottom are 'Cancel' and 'OK' buttons.

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

This section shows how options appear in each transaction type after they are created.

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:

Enter new requisition...

Name: CMS

Order date:

Reference:

Comment:

Max MOS:

Threshold MOS: ☐ Hide stock over threshold

ID: 8

Status: nw

Type: request

Entry date: 23/10/19

Entered by: user 1 (pass=ut)

Store: General Warehouse

Print

Filter items:

Buttons: New line, Add from master list, Delete line(s)

Buttons: Data entry, Log

LI...	Item code	Item name	Unit	Our stock on hand	Average monthly consump...	Months of stock	Calculated quantity	User requested quantity	Reason	Comment
1	amo500t	Amoxicillin 500mg tab/cap	ea	4000	0	0	0	5000	Replenishing expired stock	
2	chip150t	Chloroquine phos... 150mg (base) tab	ea	500	0	0	0	2000	Enter reason for variation: Outbreak Replenishing expired stock	

Buttons: Save Sort order

Buttons: ☐ Finalise, , ,

When any active options of this type 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](#)).

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 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:

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 and edit the **Stock take qty** value to be different from the **Snapshot Quantity**; 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:

A reason must be selected from the **Option** dropdown list.

Add cash transaction

Copy ID to Clipboard

Invoice Number: 1

Entered by: Admin

Entry date: 18/07/19

Confirm date:

Name: Alders Store (dropdown arrow)
 ALD

Transaction type: Cash out (dropdown arrow)

Amount: (input field) 10

Option: Refund (dropdown arrow)

Description: (text area)

New cash register balance: USD 0

Cancel OK

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.

The screenshot shows the 'Prescription Entry' window. The 'Patient details' tab is active, showing fields for Name (Patient, Test), Date of birth (23/11/1974), Gender (Female), Store (AKPESSEKRO (CSR-D PUBLIC)), Entered (04/06/2020), Invoice (431), and Entered by (Sussel). The 'Payment' tab is also visible, showing '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), and 'Payment details' (Amount paid by credit 50.00, Amount paid by patient 250.00, Total payment 250, Amount given 0, Change to give back 0). A red box highlights the 'Select the payment type' dropdown menu. The bottom of the window has buttons for 'Finalise', 'Export batch: 0', 'Status: on', 'Print receipt', 'OK & Next', 'Delete', and 'OK'.

Previous: [16.09. Barcode scanning preferences](#) | | Next: [16.11. Custom fields](#)

From:

<https://docs.msupply.org.nz/> - mSupply documentation wiki

Permanent link:

<https://docs.msupply.org.nz/preferences:options?rev=1591954984>

Last update: 2020/06/12 09:43

