

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

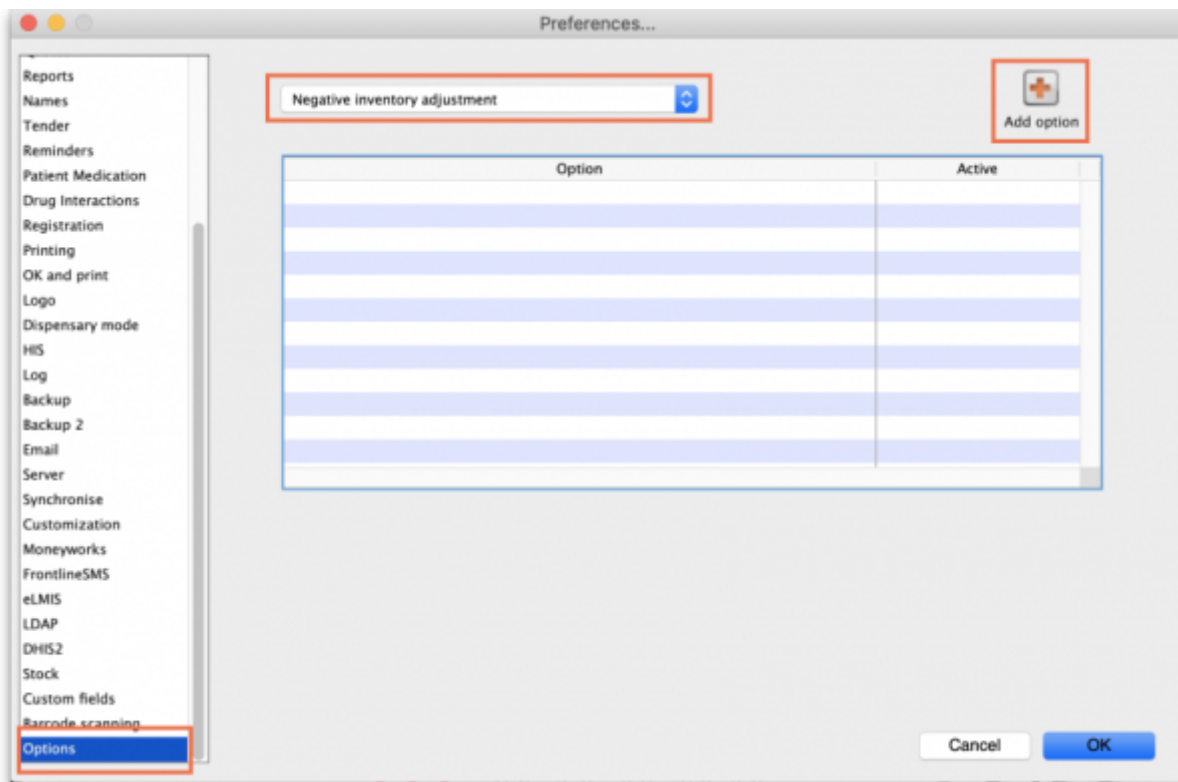


In a sync system, Options must be added on the **central server** and will then sync to other sites.

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:

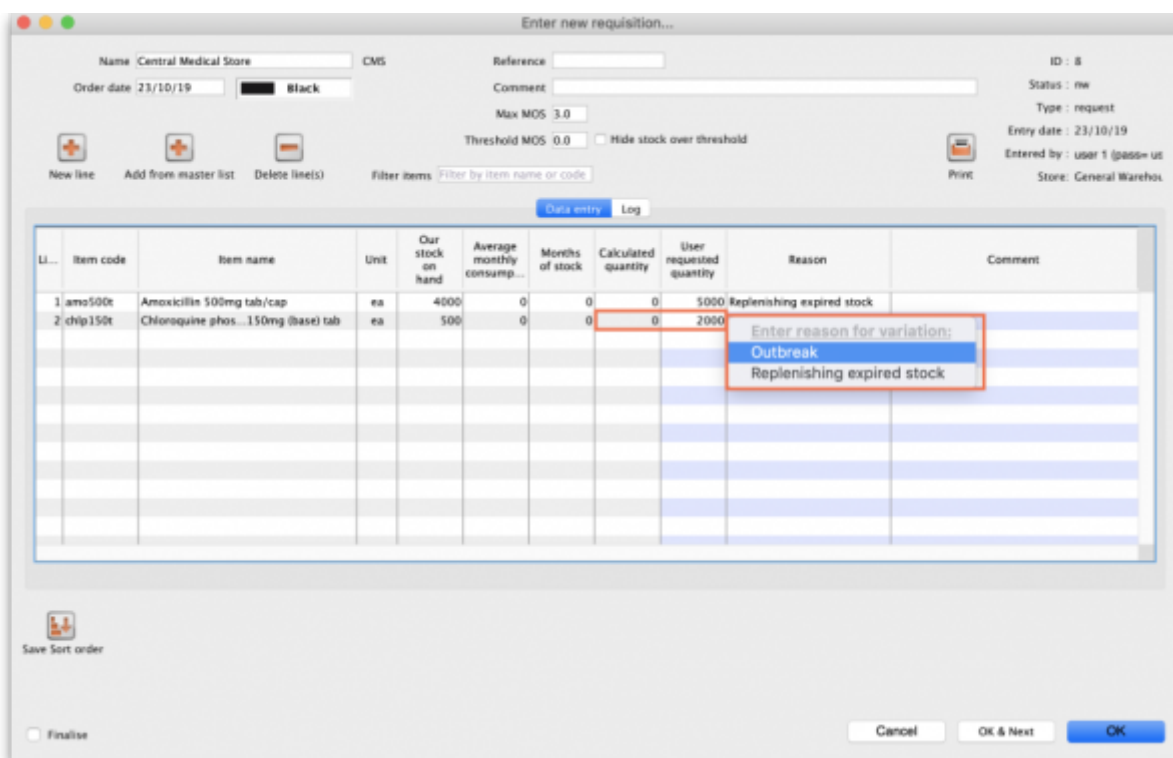
Using options

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:



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

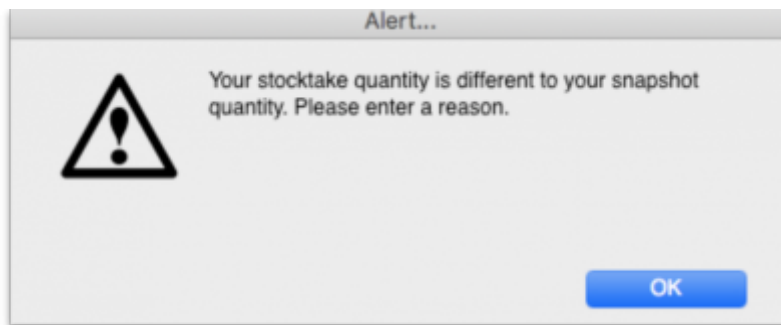
In the main stocktake window, if the **Enter Quantity** value is adjusted to be different from the **Snapshot Quantity** value like this, for example:



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.

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

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 dialog box titled "Add cash transaction". It contains several input fields and dropdown menus. The "Option" dropdown menu is highlighted with a red border and shows "Refund" selected. Other fields include "Invoice Number" (1), "Entered by" (Admin), "Entry date" (18/07/19), "Confirm date" (empty), "Name" (Alders Store), "Transaction type" (Cash out), "Amount" (10), "Description" (empty), and "New cash register balance: USD" (0). There are "Cancel" and "OK" buttons at the bottom.

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

New Patient Code: Testp01

Address:

Store: AKPESSEKRO (CSR-D PUBLIC)

Entered: 04/06/2020

Invoice: 431

Entered by: Susael

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:

Finalise

Export batch: 0

Status: on

Print receipt

OK & Next

Delete

OK

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

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