

15.10. 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.
- **Open vial wastage:** Reasons for open vial wastage when dispensing vaccines.

Creating options

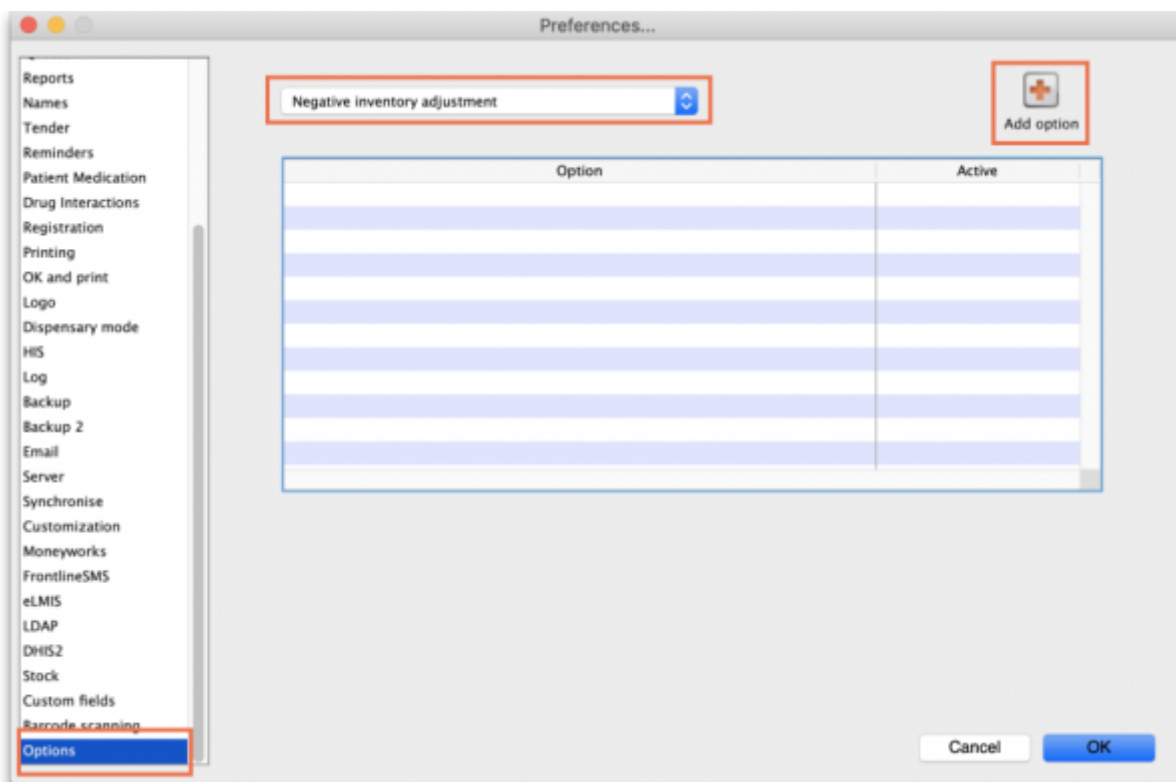


In a sync system, Options must be added on the **central server** and will then sync to other sites.

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:



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:



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

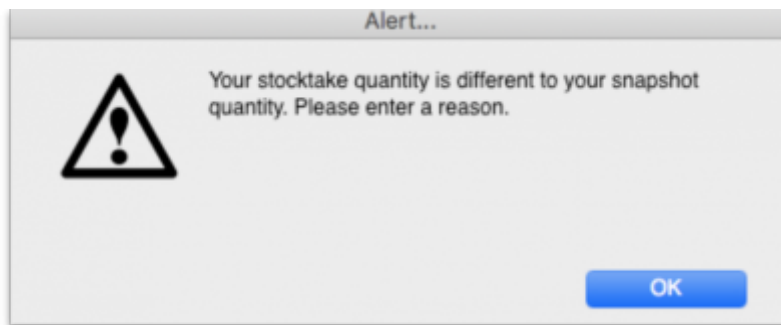
In the main stocktake window, if the **Enter Quantity** value is adjusted to be different from the **Snapshot Quantity** value like this, for example:



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

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:

The screenshot shows a window titled "Add cash transaction" with the following fields and controls:

- Copy ID to Clipboard**: A button with a clipboard icon.
- Invoice Number**: Text input field with value "1".
- Entered by**: Text input field with value "Admin".
- Entry date**: Text input field with value "18/07/19".
- Confirm date**: Empty text input field.
- Name**: Text input field with value "Alders Store" and a dropdown arrow button.
- ALD**: Text input field with value "ALD".
- Transaction type**: Dropdown menu with value "Cash out".
- Amount**: Text input field with value "10".
- Option**: Dropdown menu with value "Refund", highlighted with a red border.
- Description**: Large empty text area.
- New cash register balance:** Text input field with value "0".
- USD**: Text label below the balance field.
- Buttons**: "Cancel" and "OK" buttons at the bottom.

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:

The screenshot shows the 'Prescription Entry' window. At the top, there are 'Patient details' including Name (Patient, Test), Date of birth (23/11/1974), and Gender (Female). Below this, there are fields for Prescriber, Code, Confirm date (04/06/2020), and Prescription date (04/06/2020). On the right, there is a dropdown for 'Black' and a 'Store' field set to 'AKPESSEKRO (CSR-D PUBLIC)'. Further down, it shows 'Entered 04/06/2020', 'Invoice 431', and 'Entered by Susael'. The main area is divided into 'Items' and 'Payment' tabs. Under 'Payment', there are sections for 'Other details' (with a red warning message: 'This invoice will be automatically finalised if a payment is entered.'), 'To Pay' (showing Invoice total 300.00 and 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 in the Payment details section. At the bottom, there are buttons for 'Finalise', 'Export batch: 0', 'Status: on', 'Print receipt', 'OK & Next', 'Delete', and 'OK'.

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