

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:

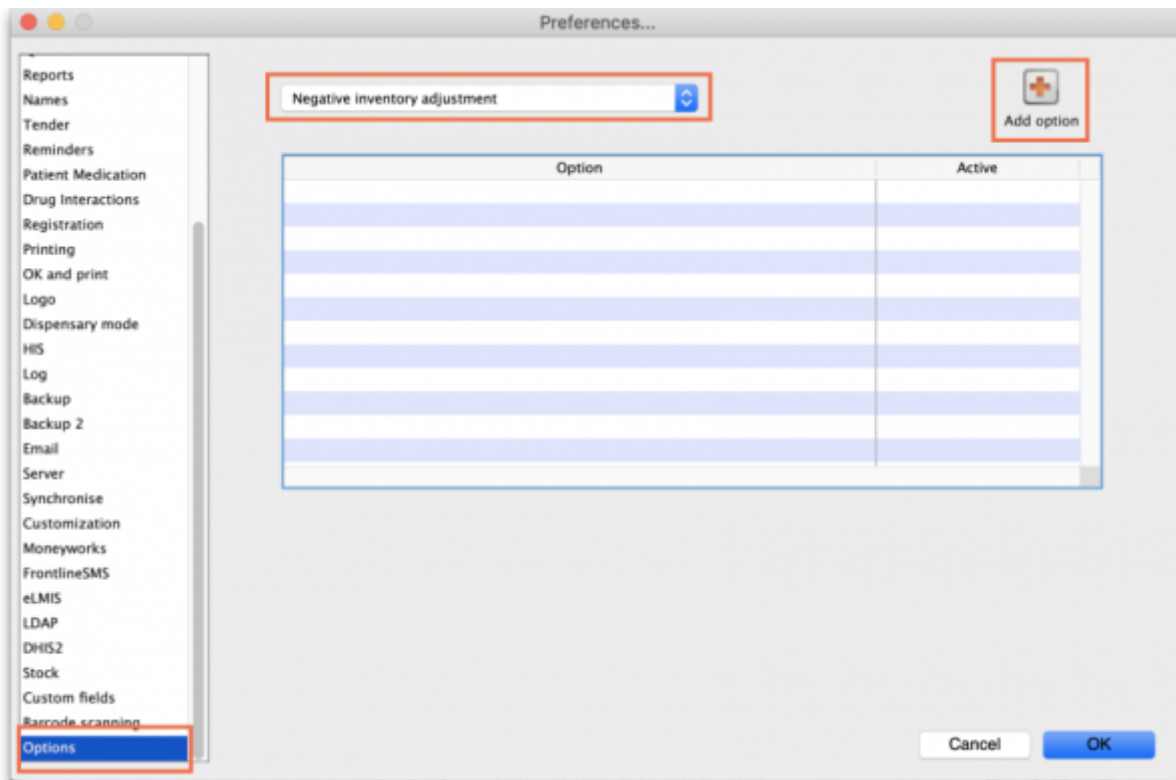
- **Requisition Line Variance:** Reasons for a variation between the suggested quantity and entered quantity in a requisition line.
- **Positive Inventory Adjustment:** Reasons for a positive adjustment between the snapshot quantity and entered quantity in a stocktake line (to help answer the question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

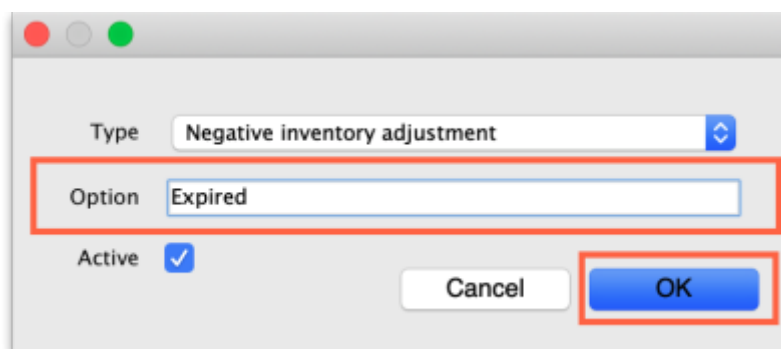


2. Click on the *Options* tab in the list on the left hand side to see this page:




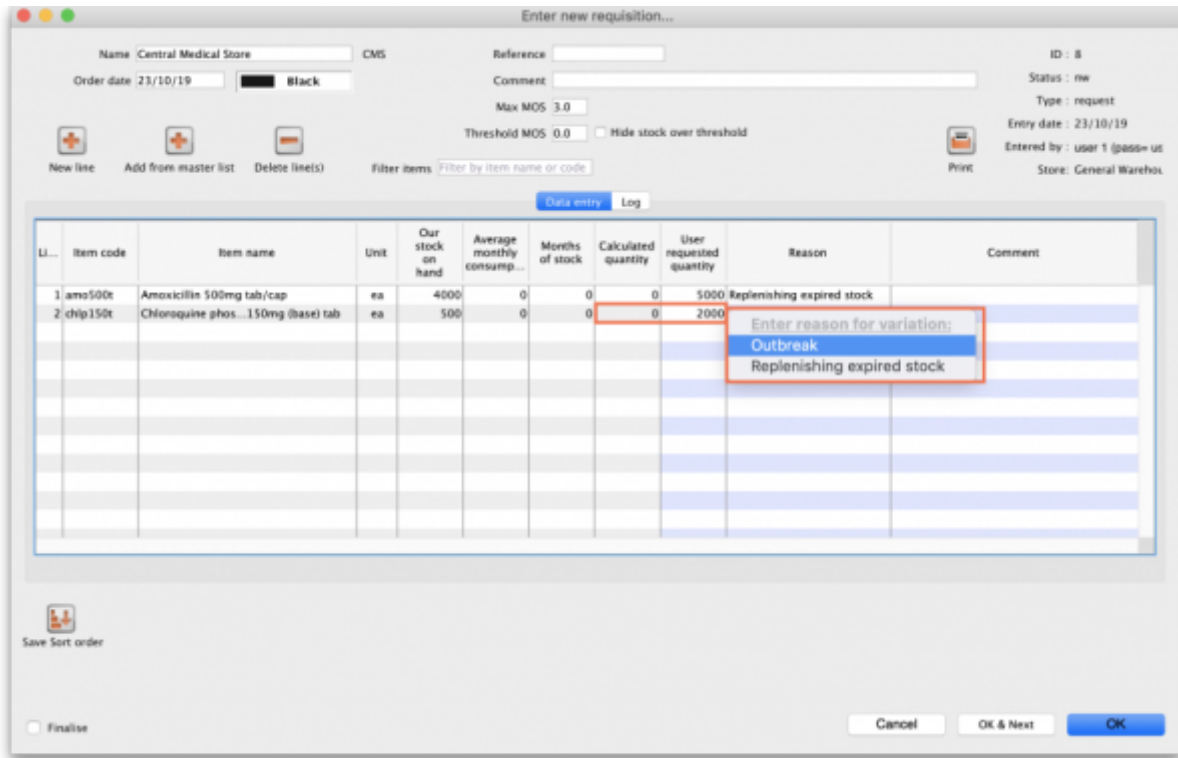
3. Select the transaction type requiring options from the dropdown list at the top. When you do that, the table will show all the existing options for that type.

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.

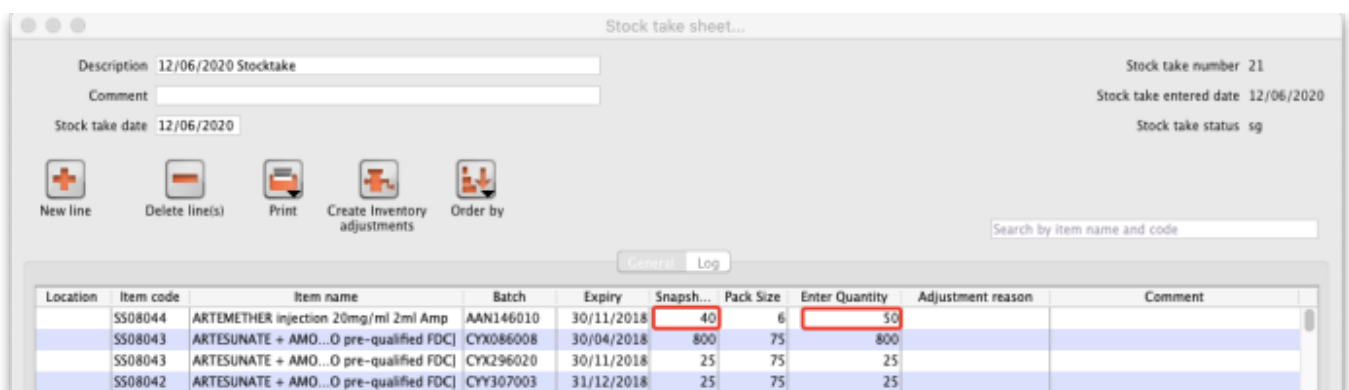


Positive or negative inventory adjustment

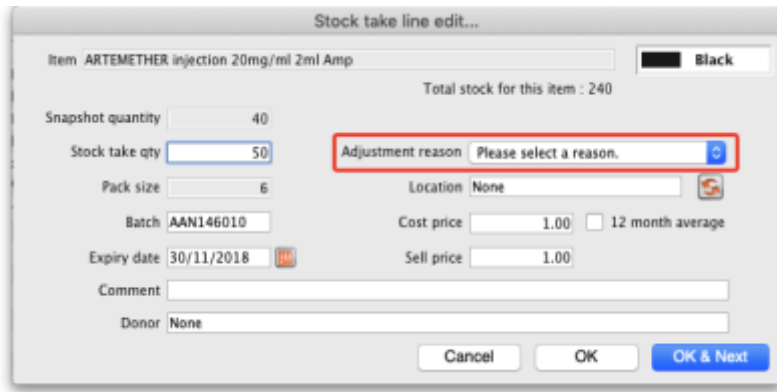
When any active options of these two types are available, they are used in a stocktake (see the [4.17. Stocktakes](#) page) or when manually creating inventory adjustments (see [4.19. Inventory adjustments](#)).

Stocktakes

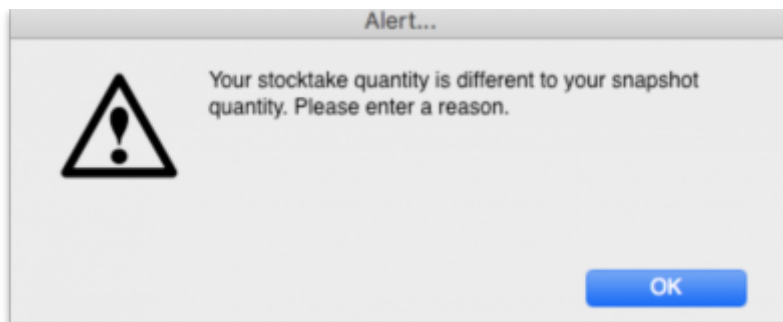
In the main stocktake window, if the **Enter Quantity** value is adjusted to be different from the **Snapshot Quantity** value like this, for example:



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:



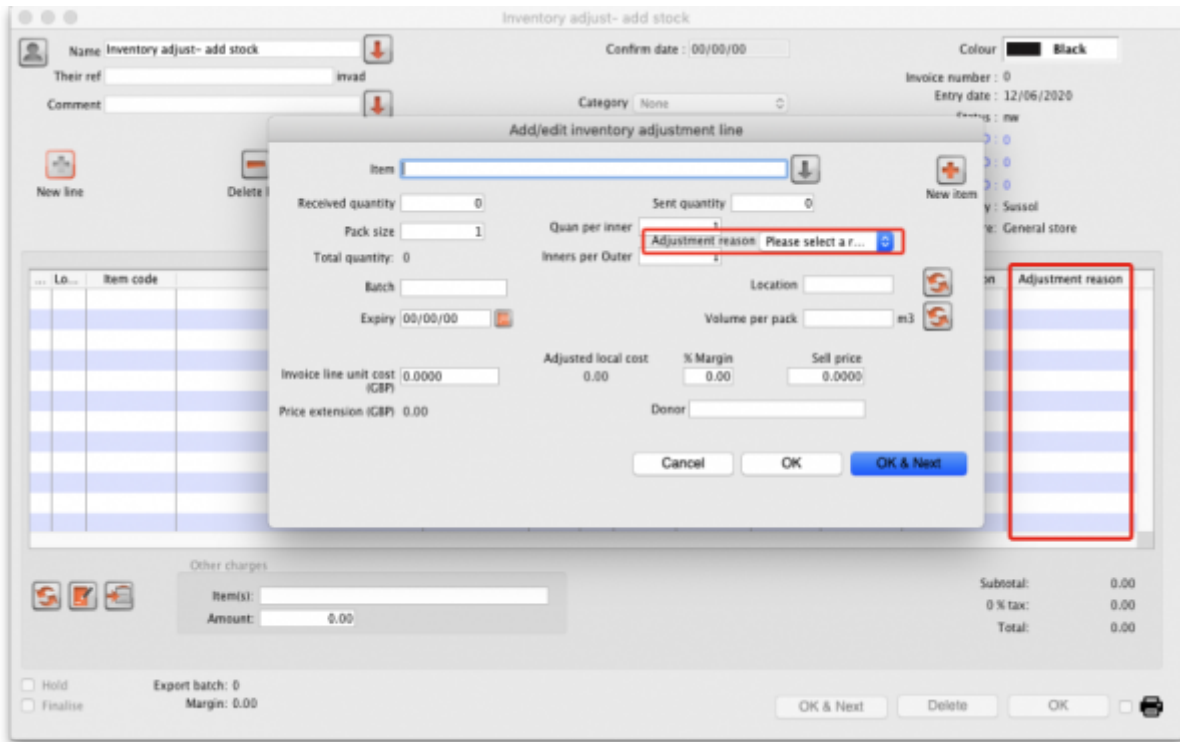
Of course, the same is true if you double-click on a line in the main stocktake window and edit the **Stock take qty** value to be different from the **Snapshot Quantity** in the stock take line edit window; you must select a reason from the **Adjustment reason** drop down list before you can proceed.

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.

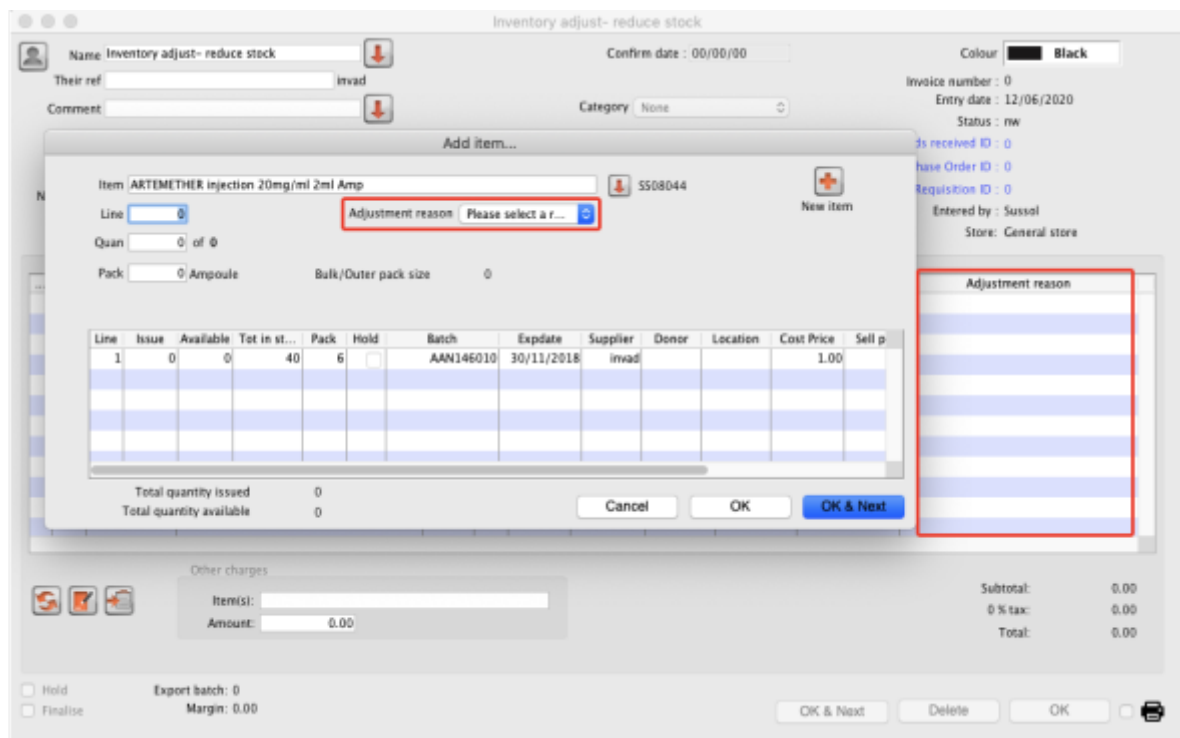
Any reasons entered on a stocktake are carried through to the corresponding inventory adjustment lines that are created when the stocktake is finalised.

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 'Add cash transaction' dialog box with the following fields and values:

- 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 (highlighted with a red box)
- Description: (empty text area)
- New cash register balance: 0 USD

Buttons: Copy ID to Clipboard, 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:

The screenshot shows a software window titled "Prescription Entry". It is divided into several sections:

- Patient details:** Includes 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 (Susael). There are also fields for Prescriber, Code, Confirm date (04/06/2020), and Prescription date (04/06/2020).
- Items: Payment:** This section is active and contains:
 - Other details:** A message "This invoice will be automatically finalised if a payment is entered." and fields for Cheque # and Note.
 - To Pay:** Invoice total (300.00) and Total to pay (300).
 - Patient's credit status:** Current balance (100.00), Credit limit (100.00), and Available credit (100.00).
 - Payment details:** Amount paid by credit (50.00), Amount paid by patient (250.00), Total payment (250), Amount given (0), and Change to give back (0). A dropdown menu labeled "Select the payment type" is highlighted with a red box.
- Footer:** Includes checkboxes for "Finalise" and "Print receipt", "Export batch: 0", "Status: on", and buttons for "OK & Next", "Delete", and "OK".

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

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