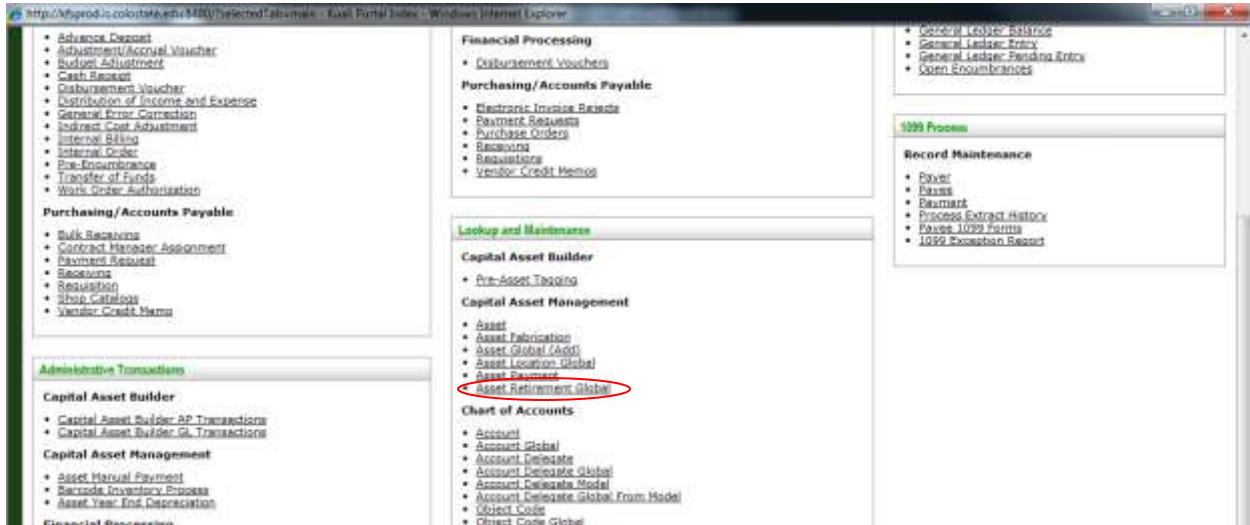
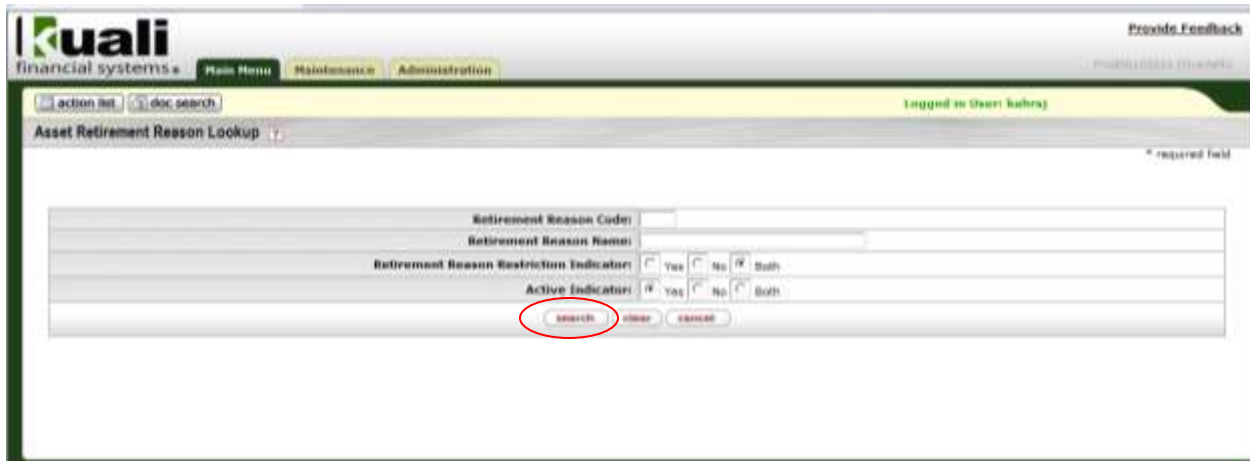


Creating a Trade-In Document in Kualu

On the Main Menu screen under the **Lookup and Maintenance** box in the middle of the screen look under the **Capital Asset Management** heading and click on the **Asset Retirement Global** link.



You will see the following screen. Click **search** without entering any information to get the list of retirement reasons that you can choose from.



Click on the **return value** link for reason code 2, **trade-in**.

19 items retrieved, displaying all items.

Return Value	Retirement Reason Code	Retirement Reason Name	Retirement Reason Restriction Indicator	Active Indicator
	0	Credit	Yes	Yes
	1	Sold	Yes	Yes
return value	2	Trade-in	No	Yes
return value	3	Lost	No	Yes
	4	Recycled	Yes	Yes
	5	Carriabilized	Yes	Yes
	6	Gift	Yes	Yes
return value	7	Theft	No	Yes
	8	Destroyed	Yes	Yes
return value	9	External Transfer	No	Yes
	A	Auction (public surplus auction)	Yes	Yes
	C	Check Cancelled	Yes	Yes
	E	Asset Created in Error	Yes	Yes
	H	Retirement of Control Assets	Yes	Yes
	J	General Error Correction	Yes	Yes
	M	Merged	Yes	Yes
	P	Park Fund Retirement	Yes	Yes
	R	Razed	Yes	Yes
	S	Asset Separated Retirement	Yes	Yes

Export options: [CSV](#) | [spreadsheet](#) | [HTML](#)

When you select **return value** for the trade-in retirement reason you will see the following screen.

Asset Retirement Detail

Retirement Reason Code: 2 - Trade in
Retirement Name: Trade-in

Asset Detail Information
Asset Reason: 5

As with all other documents in Quali, you will need to enter a **Description** in the **Document Overview** tab. *Example: Trading-in Copier*

You will use the explanation field (also located in the **Document Overview** tab) to put in the requisition number for the new piece of equipment and any other notes you wish.

The next tab is the **Asset Detail Information** tab. You will need to do a search for the asset number by clicking on the magnifying glass to the right of the **Asset Number** field. You will see the following search screen. Type your CSU decal number into the **Tag Number** field and search. When the search results come up and you find the asset that you want you will select **Return Value**.

Asset Lookup

Tag Number: 321564

Organization Owner Chart Of Accounts Code: []

Organization Owner Account Number: []

Campus: []

Building Room Number: []

Asset Status Code: []

Vendor Name: []

Model Number: []

Create Date From: []

Create Date To: []

Asset Representative Principal Name: []

Asset Description: []

National Stock Number: []

Old Tag Number: []

Total Cost: []

Payment Purchase Order Number: []

Asset Number: []

Organization Owner Organization Code: []

Owner: []

Building Code: []

Asset Type Code: []

Asset Condition: []

Manufacturer: []

Serial Number: []

Organization Inventory Name: []

Organization Text: []

Government Tag: []

Organization Tag Number: []

Payment Sequence Number: []

Payment Document Number: []

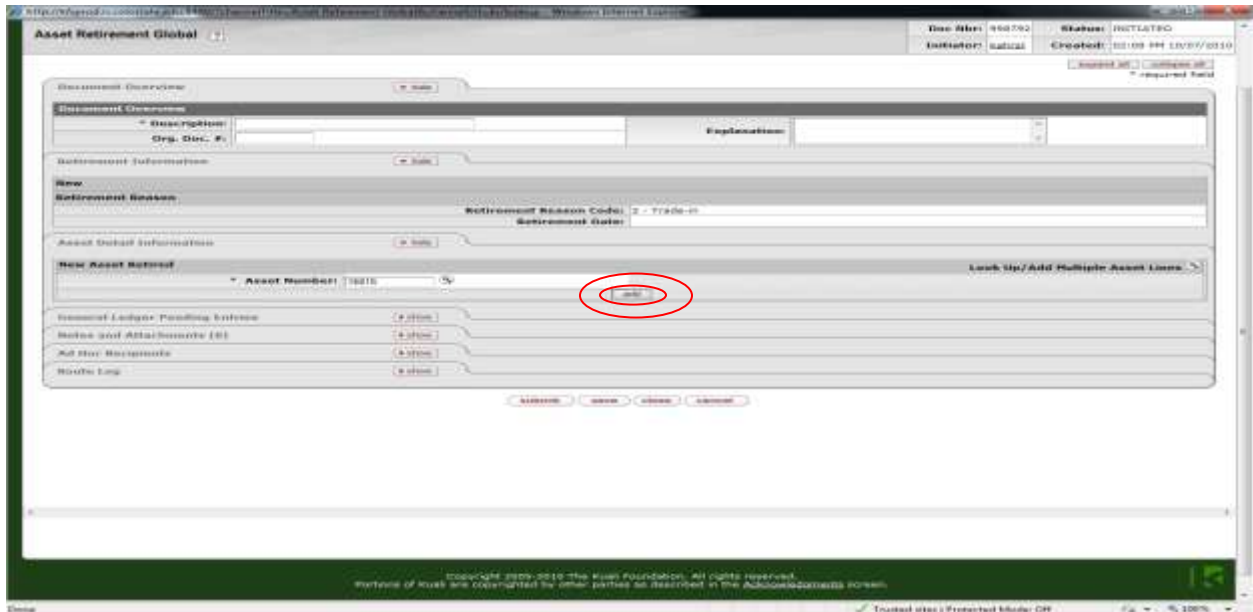
search clear cancel

One item retrieved.

Return Value	Asset Number	Tag Number	Organization Owner Organization Code	Building Code	Asset Status Code	Asset Description	Asset Type Code	In-Service Date
return value	0813	321564	8012	0250	A	LUKE PAY STATION WITH A/C POWER AND HEATER	000220E	08/31/2007

Export options: CSV | spreadsheet | XML

When you get back to the main screen of the document and the asset number is showing in the **Asset Number** field you must click the **Add** button to pull the asset info into the document.



The screenshot shows the 'Asset Retirement Global' form. The 'New Asset Retired' section contains the 'Asset Number' field with the value '18816' and a percentage field set to '5%'. A red circle highlights the 'Add' button located to the right of the 'Asset Number' field. Other sections include 'Document Overview', 'Retirement Information', and 'Asset Detail Information'. At the bottom, there are tabs for 'Financial Ledger Pending Entries', 'Notes and Attachments (0)', 'Ad Hoc Recipients', and 'Route Log'. A 'Submit' button is visible at the bottom center.

At this point you may add any notes or attachments you need to add in the **Notes and Attachments** tab and ad hoc anyone you need to ad hoc in the **Ad Hoc Recipients** tab.

Click on submit when you are finished. You should see the message **Document was successfully submitted** at the top of the document! If not, you will instead see in red lettering an explanation of the problem – correct the error and resubmit.