Creating a Trade-In Document in Kuali

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**.

When you select **return value** for the trade-in retirement reason you will see the following screen.
As with all other documents in Kuali, 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**.
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.

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.