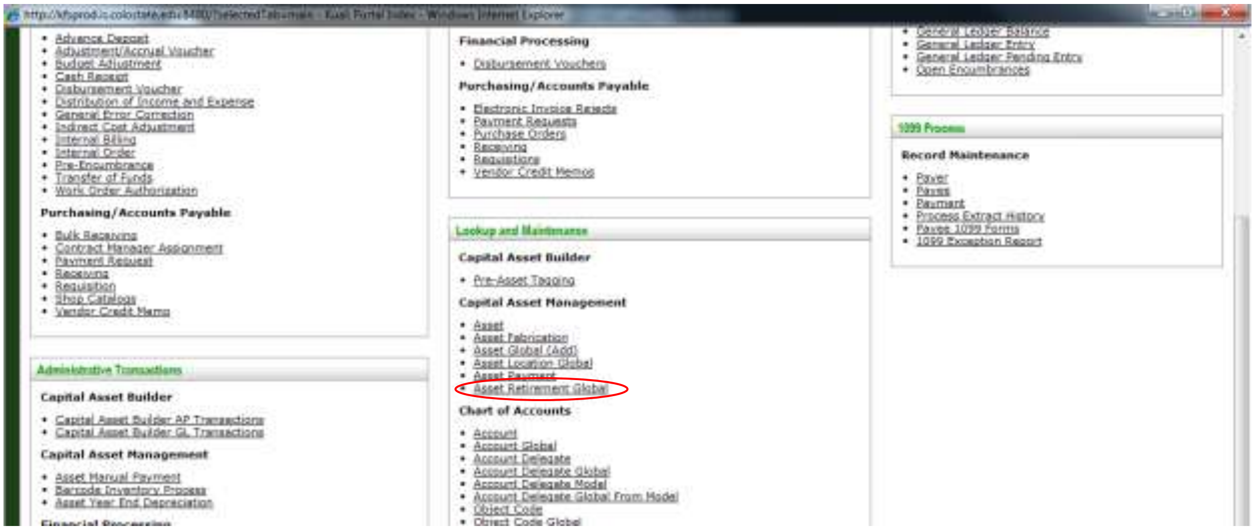
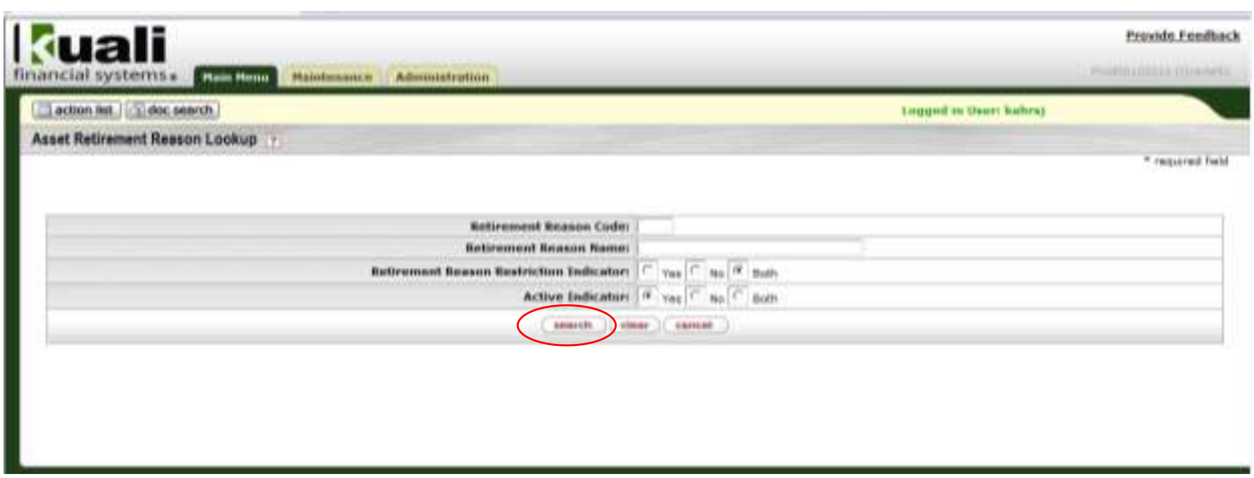
Creating a Trade-In Document in Kuali

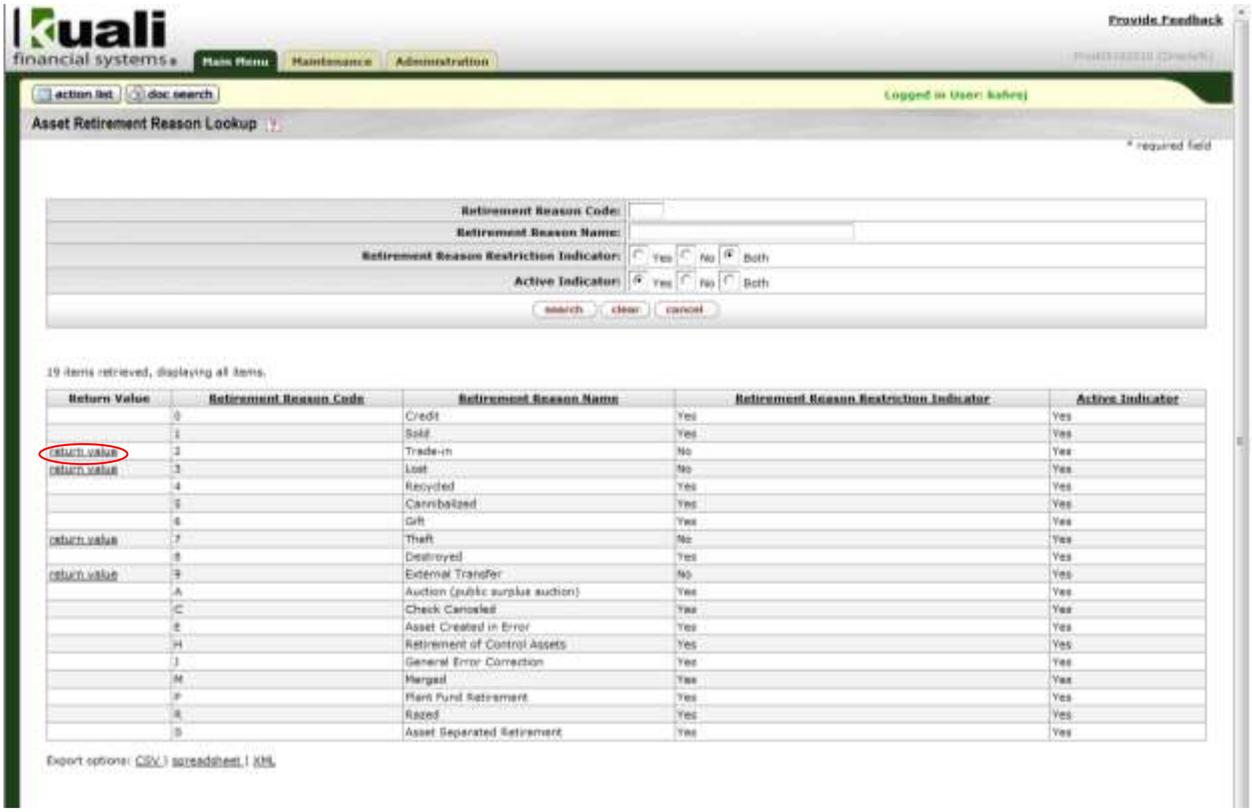
On the Main Menu screen under the **Lookup and Maintenance** box in the middle of the screen look under the **Capital Asset Management** heading and click on the **Asset Retirement Global** link.



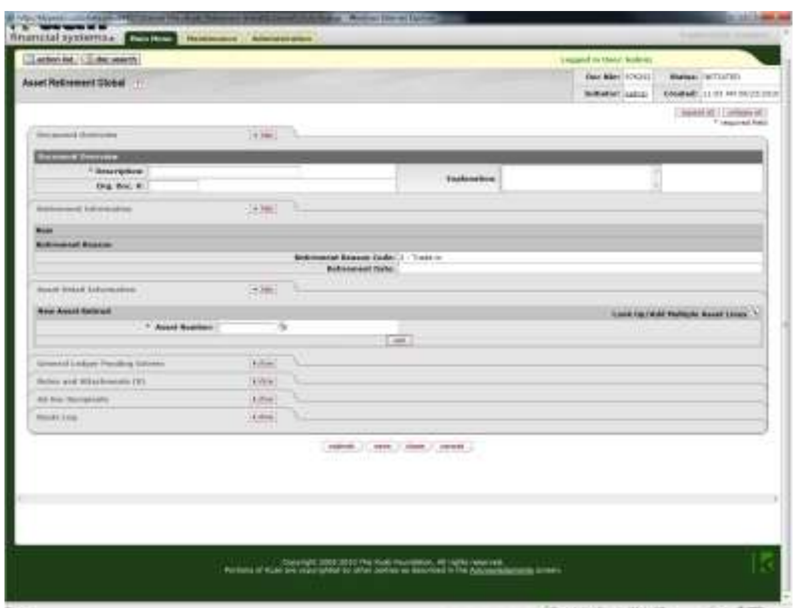
You will see the following screen. Click **search** without entering any information to get the list of retirement reasons that you can choose from.



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



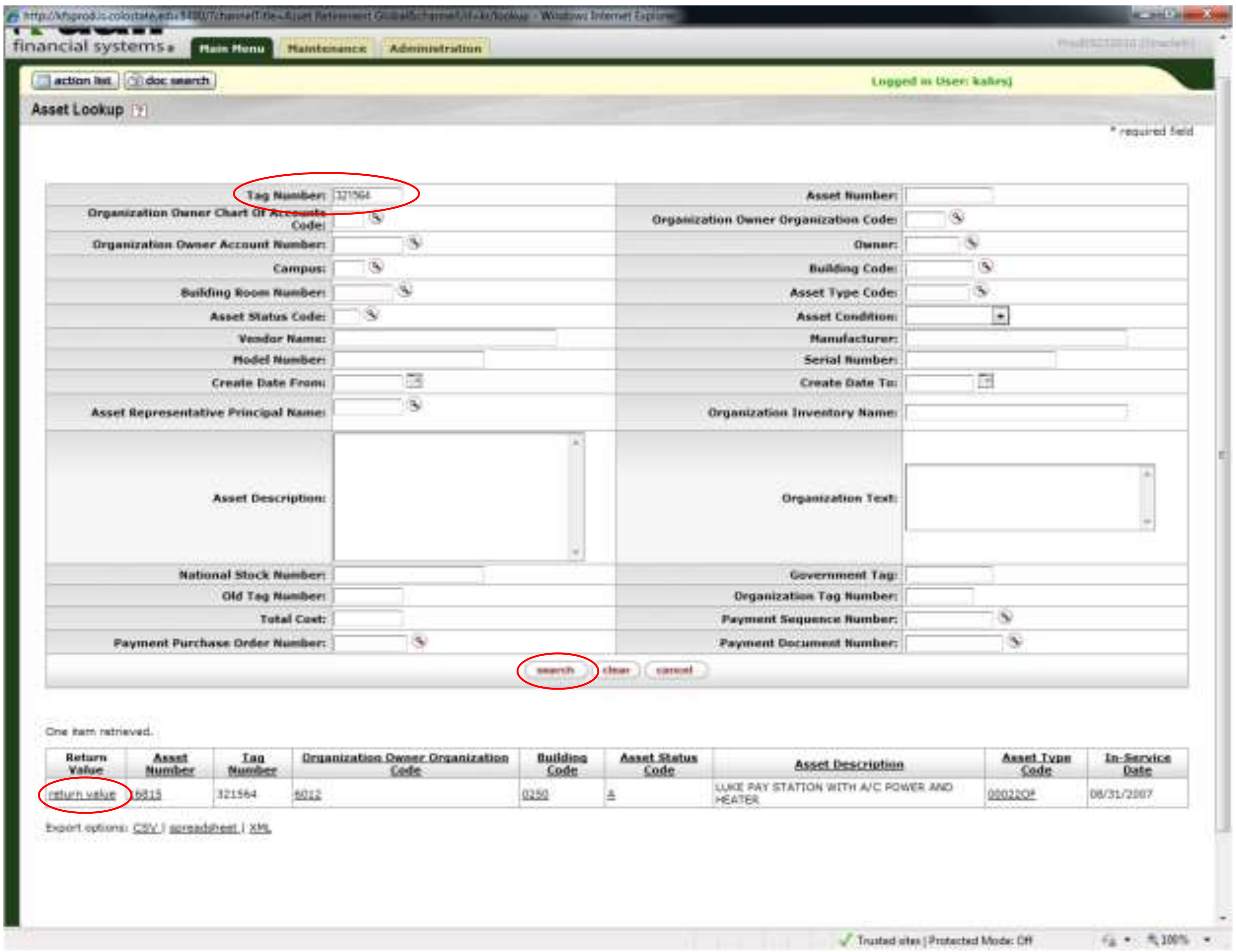
When you select **return value** for the trade-in retirement reason you will see the following screen.



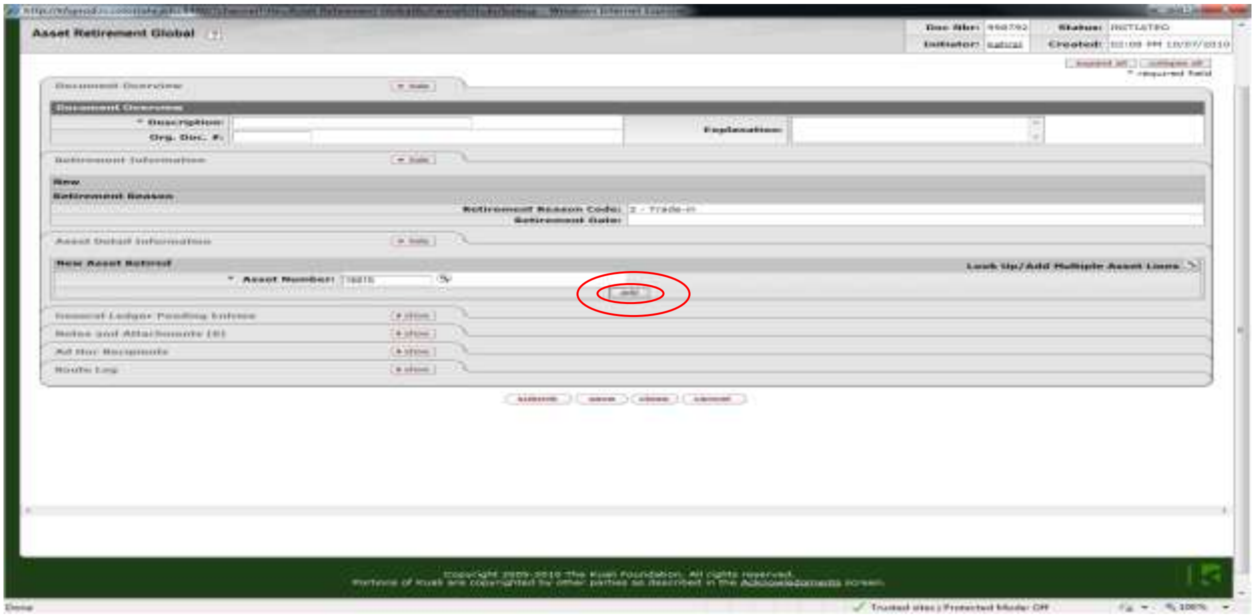
As with all other documents in Kuali, you will need to enter a **Description** in the **Document Overview** tab. *Example:* Trading-in Copier

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.