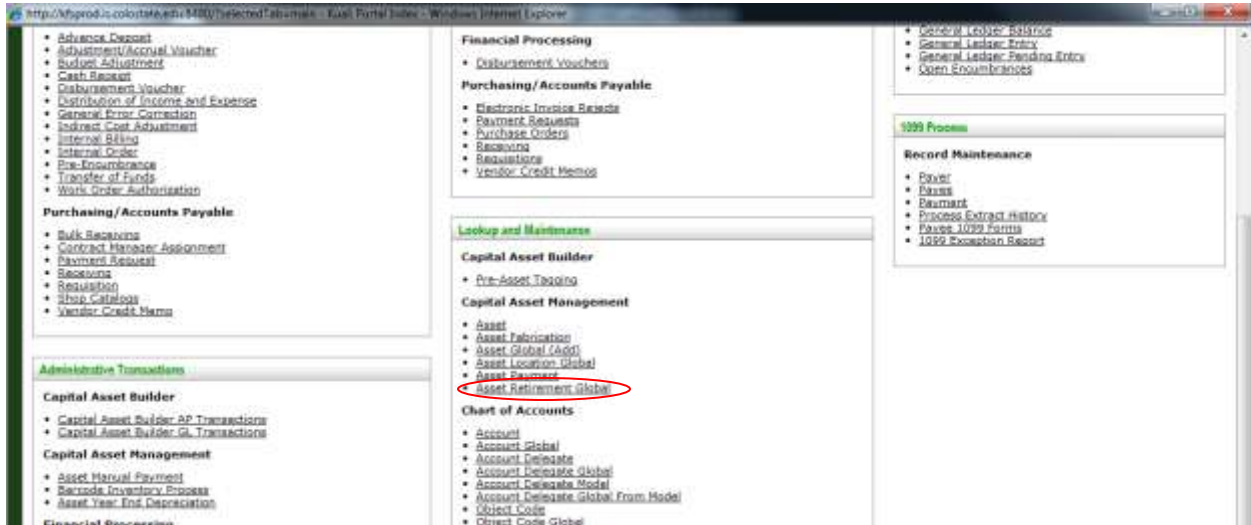
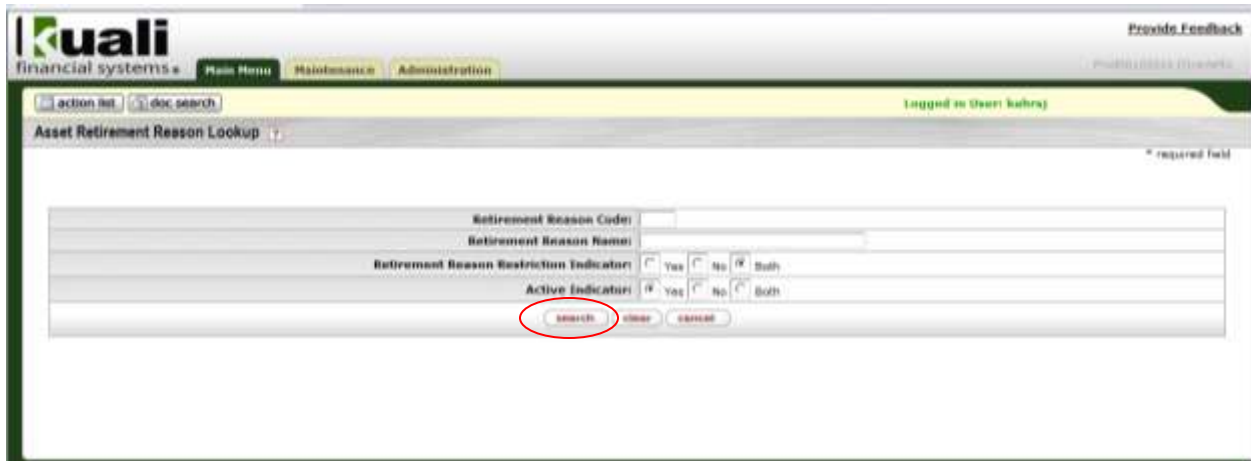


## Creating a Trade-In Document in Kualu

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
<a href="#">return value</a>	2	Trade-in	No	Yes
<a href="#">return value</a>	3	Lost	No	Yes
	4	Recycled	Yes	Yes
	5	Carriabilized	Yes	Yes
	6	Gift	Yes	Yes
<a href="#">return value</a>	7	Theft	No	Yes
	8	Destroyed	Yes	Yes
<a href="#">return value</a>	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 Description: [1/30]

Retirement Information: [1/30]

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

Asset Detail Information: [1/30]

Asset Number: 5

General Ledger Posting System: [1/30]

Notes and Attachments (1): [1/30]

All File Attachments: [1/30]

Asset Log: [1/30]

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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.

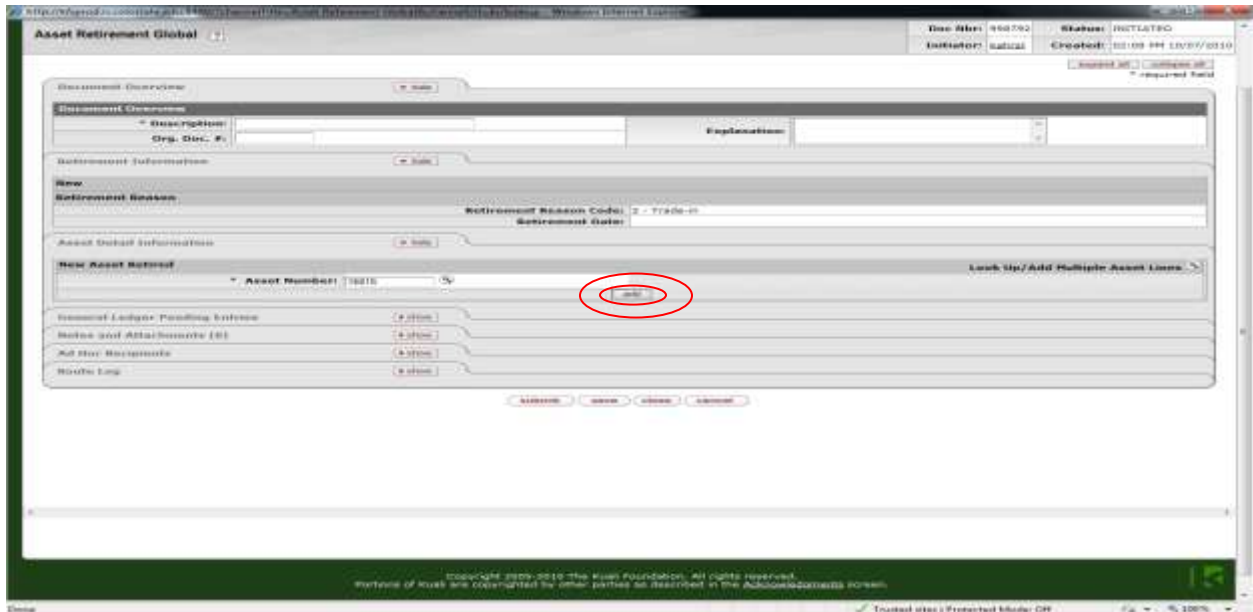
The next tab is the **Asset Detail Information** tab. You will need to do a search for the asset number by clicking on the magnifying glass to the right of the **Asset Number** field. You will see the following search screen. Type your CSU decal number into the **Tag Number** field and search. When the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

The screenshot displays the 'Asset Lookup' web application. At the top, there are navigation tabs for 'Home Menu', 'Maintenance', and 'Administration'. The user is logged in as 'kaksj'. The main form is titled 'Asset Lookup' and contains several input fields. The 'Tag Number' field is circled in red and contains the value '321564'. Below the form, there are 'search', 'clear', and 'cancel' buttons, with the 'search' button also circled in red. The search results are displayed in a table below the form.

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 a web-based form titled "Asset Retirement Global". The form is divided into several sections: "Document Overview", "Retirement Information", "Asset Detail Information", and "Financial Ledger Pending Entries". The "Asset Detail Information" section contains a table with columns for "Asset Number" and "Qty". The "Asset Number" field is populated with "18816" and the "Qty" field is "5". A red circle highlights the "Add" button located to the right of the "Asset Number" field. Below the table, there are links for "Financial Ledger Pending Entries", "Notes and Attachments (0)", "Ad Hoc Recipients", and "Route Log". At the bottom of the form, there are buttons for "Submit", "Cancel", "Close", and "Print".

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.