

QUICK REFERENCE GUIDE TRADE-IN PROCESSING

MEGABUS HELPLINE

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HOW TO PROCESS TRADE-INS ON AN INVOICE

Introduction

This guide demonstrates how to process trade-ins on an invoice. Trade-Ins are basically a Purchase and Sale in the one invoice. Goods can be traded from customers and the new goods sold with the net price or difference calculated on the invoice. All traded goods are brought into stock at the traded price.

How to process a trade-in

Invoice entry caters for processing trade-ins from customers with or without an ABN.

- 1. Process the invoice as normal, entering the Customer, AutoTracker details, Salesperson etc. (be sure you have saved an address and phone number for the customer).
- 2. Enter the lines for the products being purchased by the customer
- 3. On a new product line, select Add Trade-In



Depending on the details you have stored for this customer in Customer Maintenance, one of the following popups will provide you with additional information:

Trade-In X You are adding a Trade-In for an ABN registered customer WITHOUT an RCTI Agreement. GST will be calculated on the Trade-In and will be shown as a separate sub-total on the Tax Invoice. It is the Customer's responsibility to either enter into an RCTI Agreement or provide a Tax Invoice for the items traded in, by the first week of the following Calendar month. On a copy invoice, obtain the Customer's signature, along with date and phone number.



4. For customers with an ABN, you will be prompted for the Tax Invoice number upon entering the trade-in amount. You have the option to leave this blank and enter it later using the Approve Trade-Ins module.

inter Tax Invoice Details	23
There is no RCTI Agreement held with this customer, but if the customer has supplied a Tax Invoice then enter the Tax Invoice Number.	
Leave blank to enter these details later.	
	OK Cancel

A red 'T' symbol in the last column highlights this product line as a Trade-in line.

5. Enter the Trade-in product code, quantity and price (the price and amount will be shown in red and subtracted from the other product lines)

Enter Invoice	🛩 Finalise 📔 Park 🛛 🗙 Void 🛛 🕖 Attach 🛛 Last	ocument: Work Order 20 💩	
Customer		AutoTracker	
Customer * Delivery Address	1 Description of the cash sale	Registration No. YTR678 P Owner MR FITZSIMMONS KEVIN 5	
Suburb State	Postcode Country	General Customer Order Number CASH SALE GST Exemption No	
Line Details	🕂 🕶 🗙 🖭 🚾 📰 😥 🎯 🛷		
Product	Description	Quantity (Inc) Sell Am	nount
DXY2256015	4 220.00 88	80.00	
PRODUCTA	P 🔁 PRODUCT A	4 50.00 20	00.00
DRODUCT	ØR	0 0.00	0.00

6. Finalise the invoice as normal.

An appropriate message will be printed on the invoice:

ABN Customer

"Includes GST of \$10 on Sales of \$110, GST of \$5 on Trade-in of \$55"

ABN Customer with no RCTI Agreement

"Credit given for Trade-in includes GST. It is the customer's responsibility to either enter into an RCTI Agreement or submit a Tax Invoice for the amount of the Trade-in."

Please visit eLearning.megabus.com.au for step by step guidance on how to use Marlin GTX and Marlin HR.