

Trade Intake Window

Introduction

The Trades feature has been expanded beginning with **Edge version 26.1** by the addition of a new **Trade Intake** window accessible when clicking **Trade/Buy** at POS. There are 3 Trade Types: **Trade Item**, **Buy Scrap**, **Buy Scrap/No Item**. Each of these **Types** have a **corresponding System Option** that controls whether that **Trade Type** appears as a selectable option on this window.

For tracking purposes and to activate applying bonuses, a new **Miscellaneous Sale Line type** was added called **Active Trade Bonus**. This sale line can be used to help **provide an incentive** for Customers to accept **Store Credit** instead of cash when selling **Scrap** to a store. If there is an **active Trade Bonus Misc Sale Line** created, then an **'Add Bonus'** checkbox appears on the new Trade Intake window. When checked, **two additional fields** will appear for **'Bonus Amount'** and **'Bonus %'** allowing you to input the bonus amount. The value of the **Trade** will be adjusted accordingly and a **Misc Sale Line** showing the amount of the bonus will be **included** in the final sale.



NOTE

If the **Trade Type** is set to **Trade Item** or **Buy Scrap**, then a **Category** is required to perform this **Trade**, and an **Item Record** will be created following the completion of the Trade. If the **Trade Type** is **Buy Scrap/No Item** then a **Category** is **NOT** required, and an **Item Record** will **NOT** be created.

Setup

System Options

As mentioned, a series of new **System Options** have been added giving you control over whether your **Trade Types** appear in the **Trade Type** dropdown menu found on the **Trade Intake** window. These are all set to True by default. As mentioned, if the **Trade Type** is set to **Trade Item** or **Buy Scrap** then a **Category** is **required**. You can set **Default Trade** and **Scrap** categories for the **created Items** in your System Options.

To view or change the **System Options**:

1. Click **Administrative > System Options > Trade Options**.
2. Locate the **3 options** named **Enable Trade Type** and change the **Type(s)** you would like hidden from the **Trade Type** dropdown to **False**.

Trade Options	
Default Description on Trade / Buy	
Enable Trade Type: Buy Scrap (No Item)	True
Enable Trade Type: Buy Scrap Item	False
Enable Trade Type: Trade Item	True
Require Permission to Trade / Buy at POS	No_Permission_Required
Show Trades Option for Returns at POS	False
Trade Vendor	XX
Trade: Default Category	99
Trade: Scrap Category	98
Trades Reduce Sales Tax Due	True

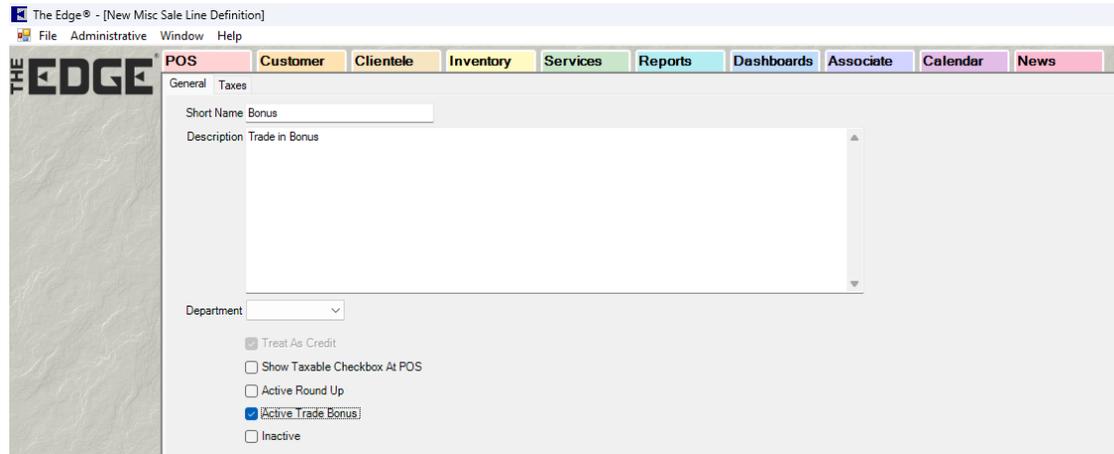
3. Next, locate the **Trade Category** options and enter your desired **Default Category** numbers in the fields as shown below.

Trade Options	
Default Description on Trade / Buy	
Enable Trade Type: Buy Scrap (No Item)	True
Enable Trade Type: Buy Scrap Item	False
Enable Trade Type: Trade Item	True
Require Permission to Trade / Buy at POS	No_Permission_Required
Show Trades Option for Returns at POS	False
Trade Vendor	XX
Trade: Default Category	99
Trade: Scrap Category	98
Trades Reduce Sales Tax Due	True

4. Click **OK** to apply your changes.

Misc Sale Line

To offer your Customers the bonus incentive for **accepting Store Credit** over cash, you must first create the **Trade Bonus** sale line and **check the Active Trade Bonus** box that activates the **Add Bonus** checkbox for applying bonuses.

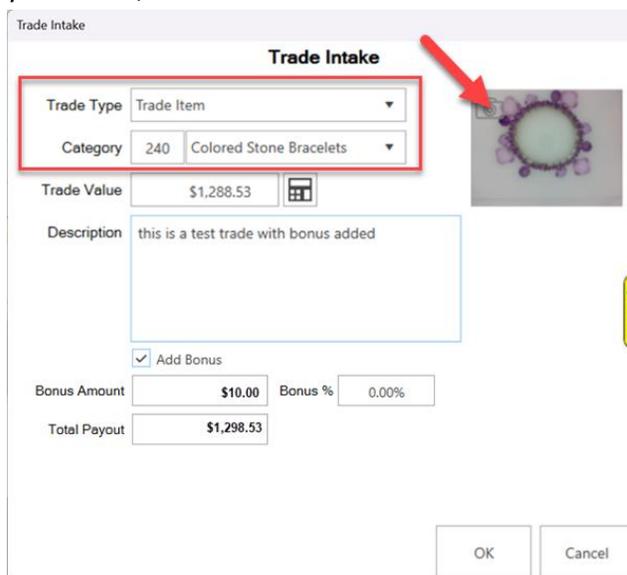


For more detailed instructions on **creating Misc Sale Lines**, please visit the [Misc Sale Lines: Add / Edit / Delete](#) article in the EdgeUser knowledgebase.

Trade Intake at POS

Processing Trades using the new **Trade Intake** screen begins just like processing Trades has previously. First you will **Find or Add the customer** and select the **associate**, as normal, then click **Trade/Buy**. The **Trade Intake** window will appear.

- Use the **Trade Type** dropdown to select the type of Trade for the transaction. If you set a **Default Trade** and/or **Default Scrap** category and select **Trade Item** or **Buy Item**, then the **Category** will automatically fill. Alternatively, you may also manually select a Category from the dropdown menu. Add an image of your **Trade**, if desired.



- Manually enter the value in the **Trade Value** field or click the **calculator icon** to open the **Metal Pricing Calculator**. Follow the link for more information on using the [Metal Pricing Calculator](#).

The screenshot shows the 'Trade Intake' window with the following fields and values:

- Trade Type: Trade Item
- Category: 240 Colored Stone Bracelets
- Trade Value: \$1,288.53 (with a calculator icon to its right)
- Description: this is a test trade with bonus added
- Add Bonus: Add Bonus
- Bonus Amount: \$10.00
- Bonus %: 0.00%
- Total Payout: \$1,298.53

Buttons: OK, Cancel

- Checking **Add Bonus** will activate the **Bonus Amount** and **Bonus %** fields for entering the **Bonus Amount** offered to your customer. The **Total Payout** amount will be adjusted accordingly.

The screenshot shows the 'Trade Intake' window with the following fields and values:

- Trade Type: Trade Item
- Category: 240 Colored Stone Bracelets
- Trade Value: \$1,288.53 (with a calculator icon to its right)
- Description: this is a test trade with bonus added
- Add Bonus: Add Bonus
- Bonus Amount: \$10.00
- Bonus %: 0.00%
- Total Payout: \$1,298.53

Buttons: OK, Cancel

- Click **OK** and complete the **Trade/Buy** transaction as normal.