Submitting a Non-Catalog Request with a Trade-In Item

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Submitting a Non-Catalog Requisition with a Trade-In Item

• A trade-in item may be added to a Non-Catalog requisition for suppliers that accept trade-ins.
• The supplier’s profile must be enabled to allow trade-ins before the requisition can be submitted.
• An internal note is added to the supplier’s profile when the trade-in option is turned on.
• UDX users can view the Internal Notes section of a supplier’s profile.

• If the Internal Notes section does not indicate that the supplier is enabled to accept trade-ins, please email a request to procurement@udel.edu.
  – Please provide the supplier number and attach the quote/proposal that includes the proposed trade-in item with your request.
In UD Exchange, click on **Non-Catalog Item** in the Quick Links section.
The **Non-Catalog Item** window will appear.

- Enter the name of the supplier into the **Select Supplier** field.
- Select the correct supplier from the list of results.
Enter the information for the first line item of your requisition in the **Description**, **Supplier Item Number**, **Quantity**, **Price**, and **Packaging** fields.

Tip: For accuracy, copy and paste the information directly from the quote you received from the supplier.
You will be required to enter a Commodity Code for each line item.

Click the **magnifying glass** next to the **Commodity Code** field to search for codes.
The **Commodity Code Search** box will appear.

Click the **blue arrow** to navigate through the pages to browse all commodity code options.

OR

Type search criteria in the **Code starts with** or **Description contains** fields to narrow your search, then click **Filter**.
A filtered list of commodity codes will appear.

Click the **blue plus sign** to select the code that most closely matches the item/service you are purchasing.

Click **Save** to add the item to your cart.
Click the **Shopping Cart** icon.

Select **View My Cart**.
Enter a name for your Shopping Cart in the **Cart Name** field.

Enter your quote number into the **Quote Number** field if applicable.

Click **Proceed to Checkout** to take the next steps on the form.
Notes about Trade-In Items

• The Trade-In item is added to your shopping cart after you have added the new item you are purchasing to the cart.

• The Trade-In item will be linked to the new item to which it applies and will be reflected as a negative dollar amount item in the shopping cart.

• If capital equipment is being traded in, please include the asset tag number on the Internal Notes line.

• Remember: The supplier must be enabled to accept Trade-Ins.
To add a Trade In item, scroll down to the items section.

- Click on the ellipsis next to the supplier for which you have a trade-in item.
- Select Add Trade-In.
The Add Trade-In screen will appear.

Enter the information for the Trade-In Item in the Description, Supplier Item Number, Quantity, Price (the amount you are receiving for the Trade-In), and Packaging fields.

Enter the price as a **positive** dollar value – the amount the supplier is paying us for the trade-in. It will be converted to a negative dollar value by the system.
• Select the line item to which the Trade-In item will be applied by clicking the **radio button** for that line.

• Click **Save**.
IMPORTANT: The account code on the original item and trade-in line item must be the same.

The Trade-In Item will be reflected as a negative dollar line item.
IMPORTANT: If the account code is 167900 (capital equipment), be sure to indicate the asset tag of the item being traded in the Internal Note/Business Justification.
Once all required fields are completed, the requisition is ready to submit.

Don’t forget to attach your quote prior to submitting!
Once all required fields are completed and you have **attached your quote** the requisition is ready to submit.

Prior to submitting the requisition, the future approval steps for the requisition are visible in the **sidebar**.

When you are ready to submit, click **Place Order**.
Questions:
• procurement@udel.edu

Resources:
• Procurement Services Website
• Submitting a Non-Catalog Request
• Searching for Supplier Information
• Commodity Code-Account Code Crosswalk
• Commodity Code-Account Code Crosswalk FACILITIES
• UNSPSC Code Lookup