Submitting a Non-Catalog Request with a Trade-In Item
What’s different in UD Exchange?

**Trade-Ins**

Previously, “trade-in” equipment was memorialized on a quote but not actually in a purchase order.

In UD Exchange, the purchase order will include a negative line with the credit and details on the item being traded in. This way Asset Management has all the information on the value of the item being purchased and the formal acknowledgement that the final cost is based on the new item less the value of the item being traded in.
Submitting a Non-Catalog Requisition with a Trade-In Item

• “Non-catalog” shopping refers to purchases where hosted or punch-out catalogs are not used. For more information see Submitting a Non Catalog Request.

• A non-catalog requisition can be initiated by a Shopper or initiated and submitted by a Requester in UD Exchange.

• A non-catalog requisition usually begins with a quote from a supplier.

• A supplier must be registered in UD Exchange prior to completing a non-catalog form. A supplier must also be configured to allow trade-ins before the requisition can be submitted.

• A Trade-In item may be added by Requesters for those suppliers that accept Trade-Ins.
Is my supplier configured for trade-ins?

- Only system administrators can see the configurations for trade-ins.
- However, an internal note is made when the trade-in option is turned on.
- If you do not see a note in the supplier notes about trade-ins, please email procurement@udel.edu to request that a supplier be configured to allow trade-ins. The ticket will be closed once this functionality has been added.
- Please be sure to include the supplier number and/or the quote including the trade-in as part of your request.
In this instance, the user emailed Procurement to make the request. The next user with a trade-in order with that supplier will see the note and know an email to Procurement is not necessary.
In UD Exchange, click on **Non-Catalog Item** in the Quick Links section.
The **Non-Catalog Item** window will appear.

1. Enter the name of the supplier into the **Enter Supplier** field.
2. Select the correct supplier from the list of results. The supplier must be configured to offer Trade-Ins.
Enter the information for the first line item of your requisition in the **Description, Supplier Item Number, Quantity, Price, and Packaging** fields.

Tip: copy and paste line item 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.
1. The **Commodity Code Search** box will appear.

2. To find your code, either browse through the pages to browse all commodity code options, or…

3. Type various criteria in the **Code starts with** or **Description contains** fields to narrow your search, and click Filter
A listing of commodity codes will appear.

Select the code that most closely matches the item/service you are requisitioning.

Click **Save** to add the item to your cart.
1. Click the **Shopping Cart** icon.
2. Select **View My Cart**.
1. Enter a name for your Shopping Cart in the **Cart Name** field.

2. Enter your quote number into the **Quote Number** field if applicable. Attachments and Shipping location can be accessed on the next page.

3. Click **Proceed to Checkout** to take the next steps on the form.
Adding a Trade-In Item

• A Trade-In item is added after adding the item to which you will apply the trade-in to the shopping cart.
• A supplier must be configured to accept Trade-Ins.
• The Trade-In item will be linked to the item to which it applies, and appear as a negative item in the shopping cart.
• If capital equipment is being traded in, please include the asset tag number on the Internal Notes line.
To add a Trade In item:

1. Scroll down to the items section.
2. Click on the ellipsis (…) next to the Supplier for which you have a trade-in item.
3. Select Add Trade-In.
The Trade-In item screen will appear. Enter the information for the trade-in in the Description, Supplier Item Number, Quantity, Price (amount you are receiving for the Trade-In), and Packaging fields.

<table>
<thead>
<tr>
<th>Description</th>
<th>Supplier Item Number</th>
<th>Quantity</th>
<th>Price</th>
<th>Packaging</th>
</tr>
</thead>
<tbody>
<tr>
<td>MF233 Used Copier</td>
<td>MF233</td>
<td>1.0000</td>
<td>400</td>
<td>EA</td>
</tr>
</tbody>
</table>

Enter price as a positive value – what the supplier is paying us for the trade-in. It will be converted to a negative value by the system.
1. You must select which line item on the requisition to which the Trade-In item / amount will be applied by clicking the radio button for that line.
2. Click **Save**.
The Trade-In Item is added as a negative line item.

IMPORTANT: The account code on the original and trade-in line item must be the same.
IMPORTANT: If the account code is 167900 capital equipment, be sure to indicate the asset tag of the item being traded.
Once all required fields are addressed, the requisition is ready to submit.
1. Prior to submitting the requisition, you can see all of the approval steps that the requisition will go through.
2. When you are ready, click **Place Order**.
You will receive confirmation that your requisition has been submitted.
Resources

See also “Submitting a Non Catalog Request”

Procurement Services
procurement@udel.edu