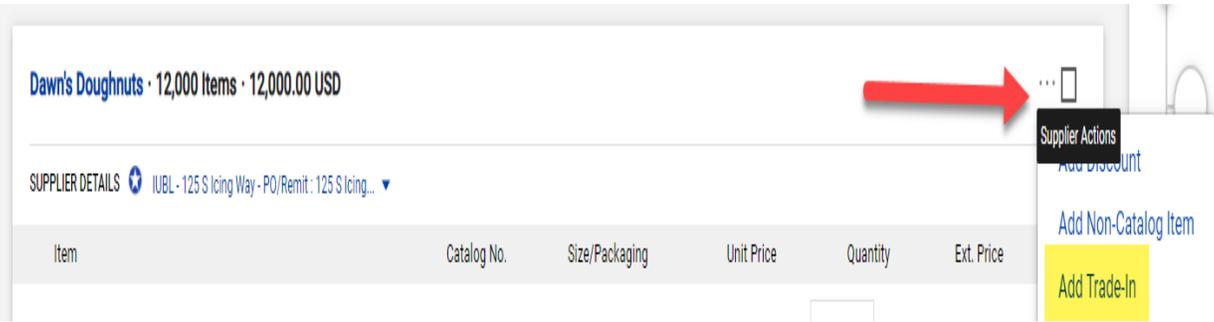


**STANDARD OPERATING PROCEDURE**

<b>SOP NO:</b>	SOP-PURCH-14
<b>SUBJECT:</b>	Trade-In Item on Order
<b>SOURCE:</b>	University Procurement Services
<b>ORIGINAL DATE OF ISSUE:</b>	05/02/2019
<b>DATE OF LAST REVISION:</b>	02/03/2022
<b>DISCLAIMER:</b>	The information provided in this Standard Operating Procedure (SOP) is designed to provide helpful information on this procedure. Purchasing reserves the right to determine on a case by case basis if a SOP should be adjusted for a particular situation. This SOP is not intended to cover each and every situation nor can it anticipate specific circumstances.
<b>RATIONALE:</b>	When a department is trading in an item towards the purchase of a new item, the trade-in item should be included on the requisition with the new purchase.
<b>PROCEDURES :</b>	<p><b>NOTE:</b>  <b>*Trade-In Items should not be done on Catalog orders. Use Non-Catalog Item form for orders with trade-ins. (this is because it can negatively impact Order Distribution method and fail transmission).</b>  <b>*REQs with Trade-In should not be copied. Start a new non-catalog item order if you have a trade-in (copied REQs may return errors in the cart)</b></p> <p>Create Non-catalog item order                  Add the line items you are buying                  After the purchased items are added to the cart, click the 'Add Trade-In link-under the 3 dots ... for Supplier Actions.</p>  <p>Complete the required Trade-In detail (Description, QTY, Unit Price), and any other optional detail that is applicable/known.</p>

**Add Trade-In**

Supplier: Search [star]

Dawn's Doughnuts, IUBL - 125 S Icing W... X Q

Distribution Methods

Item

Description *	Catalog No.	Size	Quantity *	Price *	Packaging
<input type="text"/>	USD EA - Each				

254 characters remaining

Additional Details

Link To Item

Select	Line No.	Description	Catalog No.	Quantity	Price
<input type="radio"/>	1	donuts for everyone	donuts	12,000	1.00

★ Required fields

Save Close

After the Trade-in detail is added, 'Link' the trade-in item to a purchase line item by checking the radial dial under Select and save:

**Add Trade-In**

Supplier: Search [star]

Dawn's Doughnuts, IUBL - 125 S Icing W... X Q

Distribution Methods

Item

Description *	Catalog No.	Size	Quantity *	Price *	Packaging
stale	donuts	<input type="text"/>	25,000	1	USD EA - Each

249 characters remaining

Additional Details

Link To Item

Select	Line No.	Description	Catalog No.	Quantity	Price
<input checked="" type="radio"/>	1	donuts for everyone	donuts	12,000	1.00

★ Required fields

Save Close

**NOTE:**  
 you can only link the trade-in line to one purchased line;  
 you can link a purchased item to multiple trade-in lines;

After linking the trade-in you will see a message in the line item description indicating the linkage:

**Dawn's Doughnuts - 12,025 Items - 11,975.00 USD**

SUPPLIER DETAILS IUBL - 125 S Icing Way - PO/Remit: 125 S Icing...

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price
1 donuts for everyone	donuts	EA	1.00	12,000 EA	12,000.00
ITEM DETAILS Contract: MSA_TEC-0433-2020 Commodity Code: MRO23 / Food & Tobacco Products Capital Asset?: <input checked="" type="checkbox"/> Vendor paid via payroll in the last year?: no value					Linked to Trade-in: Line #2
2 stale	donuts	EA	-1.00	25 EA	-25.00
ITEM DETAILS Contract: no value Commodity Code: MRO23 / Food & Tobacco Products Capital Asset?: <input checked="" type="checkbox"/> Vendor paid via payroll in the last year?: no value					Linked to Item: Line #1

Complete and Submit the REQ.

To Unlink a trade-in item, click “Remove Trade-In Link” from the Selected Line Item Action dropdown under the 3 dots ... for Line Item Actions, then delete the line item.



**As Purchasing User:**

If the requisition arrives in Purchasing and needs a trade-in item added, the same steps above would be followed.

If the requisition arrives in Purchasing with a trade-in item added, nothing additional is required.

**DEFINITIONS:**

**CROSS  
REFERENCE:**

[SOP-PURCH-13 Creating Non-Catalog Items or Recurring Payment Orders](#)