

UNIVERSITY OF DELAWARE **EXCHANGE**

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

Last revised 2/8/2023

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.

The screenshot shows the 'Supplier Profile' page for 'CANON SOLUTIONS AMERICA INC.'. The left sidebar contains a menu with 'Internal Notes' highlighted in red. The main content area shows the 'Internal Notes' section with a text editor. A red box highlights a note: '11/8/21 - set to allow trade-ins - khp'. A 'Save Progress' button is visible at the bottom right of the note area.

- 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.



Shop • Shopping Home Page

Organization Message

Welcome to the University of Delaware Exchange **Test Site!**

Here you'll find the goods and services you need. The greatly expanded **University of Delaware Exchange** provides a familiar online shopping experience and negotiated pricing from UD's preferred suppliers. You can search for items by keyword or item number. When you find the item you need, just put it in your shopping cart, and assign or submit. If you can't find what you need, click on the Non-Catalog Item link, complete the form, and assign or submit.

Please note: As you use this site for training and testing, you may see small differences from guides and the production site. This is where the administrators test new solutions before moving to production and while building new guides. Please email procurement@udel.edu if you have specific questions; chances are we are working on it!

Quick Links

[UD Exchange How To Guides](#)[How Do I Buy _____ ???](#)[Commodity Code-Account Crosswalk](#)[Non-PO Payment Matrix](#)[Non-Catalog Item](#)[Request New Supplier](#)[Request Contract](#)

My Resources

My Resources

[Product Release Library](#)[| procurement@udel.edu](mailto:procurement@udel.edu)[Site Map](#)

In UD Exchange, click on **Non-Catalog Item** in the Quick Links section.

Catalog & Forms Showcase (Under Development)

Procurement Forms

 Non-PO Payment Request	 Subaward Request	 NIIMBL Subaward Request	 RFX Request (Option 2)
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My Draft Carts

Draft

Drafts Assigned To Me

Cart Type

Number

Cart

Cart Type

Date

Total

3357878

cleaning supplies

Drafts Assigned To Me

10/13/2021

70.11 USD

Add Non-Catalog Item

Existing Supplier

Canon|

- CANON BUSINESS SOLUTIONS
- CANON FINANCIAL SERVICES INC.
- CANON SOLUTIONS AMERICA INC.
- Request New Supplier

Supplier Item Number	Quantity ★	Price	Packaging
<input type="text"/>	<input type="text"/>	<input type="text"/>	EA <input type="button" value="v"/>

Additional Details

Commodity Code

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.



Add Non-Catalog Item

Existing Supplier

CANON SOLUTIONS AMERICA INC. CANON SOLUTIONS AMERICA INC.

Fulfillment Address

MAIN - ONE CANON PARK, MELVILLE, New York 11747-0000 United States

Distribution Methods

Item

Description *	Supplier Item Number	Quantity *	Price	Packaging
MF233 Printer <small>241 characters remaining</small>	MF233	3	1000	EA

Additional Details

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.



Add Non-Catalog Item

Existing Supplier

CANON SOLUTIONS AMERICA INC. CANON SOLUTIONS AMERICA INC.

Fulfillment Address Distribution Methods
MAIN - ONE CANON PARK, MELVILLE, New York 11747-0000 United States

Item
Description ★

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.

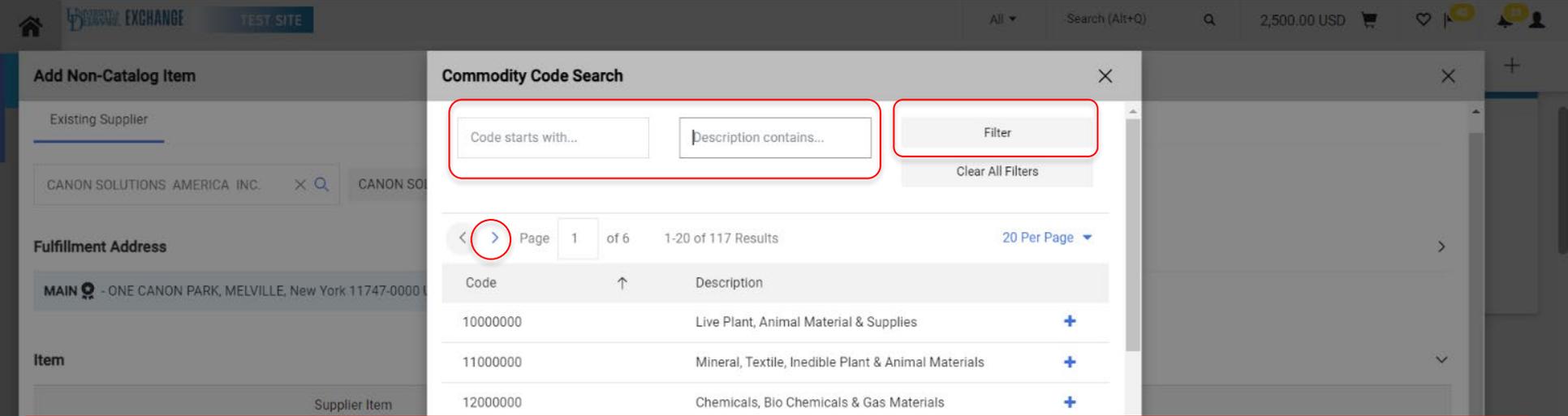
MF233 Printer MF233 3 1000 EA

Additional Details

Commodity Code

★ Required fields Save Save And Add Another Close





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**.



UNIVERSITY OF DELAWARE EXCHANGE TEST SITE

Home All Search (Alt+Q) 2,500.00 USD

Add Non-Catalog Item

Existing Supplier

CANON SOLUTIONS AMERICA INC. CANON SO

Fulfillment Address

MAIN - ONE CANON PARK, MELVILLE, New York 11747-0000

Item

Description * Supplier Item Number

MF233 Printer MF233

243 characters remaining

Commodity Code Search

Code starts with... print Filter

Clear All Filters

Code	↑	Description	
23261507		Industrial Manufacturing (3D Printing Machine)	+
45000000		Printing, Photographic, Audio and Visual Equipment & Supplies	+
73151900		Industrial Printing Services (Printing)	+

Close

Save Save And Add Another Close

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.



Shop • Shopping Home Page

Organization Message

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Please note: As you use this site for training and production site. This is where the administrators building new guides. Please email procurement@udel.edu if you are working on it!

Click the Shopping Cart icon.

Select View My Cart.

My Cart (Participant)

MF233 copiers

Quantity: 3
Price: 3,000.00 USD

View My Cart

Checkout

test PO

Quantity: 1
Price: 4,880.00 USD

7,880.00 USD

Catalog & Forms Showcase (Under Development)

Procurement Forms

 Non-PO Payment Request	 Subaward Request	 NIIIMBL Subaward Request	 RFX Request (Option 2)
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My Draft Carts

Draft

Drafts Assigned To Me ▾

Cart Type

Number ▾

Cart ▾

Cart Type ▾

Date ▾

Total ▾

3357878

cleaning supplies

Drafts Assigned To Me

10/13/2021

70.11 USD



Shopping Cart • Shopping Cart

Return Cart Assign Cart **Proceed To Checkout**

Simple **Advanced**

Search for [View advanced search criteria](#)

Cart Name:

Description:

Multi-Invoice/Payment:

Details

For Robert Requester

Estimate (7,880.00 USD)

Subtotal	7,880.00
Total	7,880.00 USD

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.

4 Items

CANON SOLUTIONS AMERICA INC. - 3 Items - 3,000.00 USD

^ SUPPLIER DETAILS

Contract	<i>no value</i>	PO Number	To Be Assigned
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Quote number:

Item	Catalog No.	Size/Packagi	Unit Price	Quantity	Ext. Price
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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.*



Requisition • 3242453



Assign Cart

Place Order

Summary PO Preview Comments 2 Attachments History

4 Items

CANON SOLUTIONS AMERICA INC. - 3 Items - 3,000.00 USD

SUPPLIER DETAILS

Contract *no value* PO Number To Be AssignedQuote number *no value*

Item

1 MF233 copiers

ITEM DETAILS

Contract:	<i>no value</i>	Internal Note/Business Justification	<i>no value</i>
Commodity Code	45000000 / Printing, Photographic, Audio and Visual Equipment & Supplies	Internal Attachments	Add
Account Code	<i>no value</i> 🚫 Required	External Note	<i>no value</i>
		Attachments for supplier	Add

Supplier Actions

[Add Non-Catalog Item](#)[Add Trade-In](#)

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**.

Draft (returned)

🚫 **Correct these issues.**
Unable to proceed until addressed.

⚠️ **Be aware of these issues.**
You may review and proceed.

Empty: Internal Note/Business Justification

7,880.00 USD

7,880.00

7,880.00

What's next for my order?

Next Step Wait for Validation Response

Approvers There are no approvers

Workflow



Add Trade-In

Supplier ★

CANON SOLUTIONS AMERICA INC., M... X Q

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.

Item

Description ★	Supplier Item Number	Quantity ★	Price ★	Packaging
<input type="text" value="MF233 Used Copier"/>	<input type="text" value="MF233"/>	<input type="text" value="1.0000"/>	<input type="text" value="400"/>	USD EA ▼

237 characters remaining

Additional Details

Link To Item

Select

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.

★ Required fields

Save Close

Add Trade-In

Supplier ★

Distribution Methods

Item

Description ★	Supplier Item Number	Quantity ★	Price ★	Packaging
MF233 Used Copier				EA

- Select the line item to which the Trade-In item will be applied by clicking the **radio button** for that line.
- Click **Save**.

Additional Details

Link To Item

Select	Line No.	Description	Catalog No.	Quantity	Price
<input type="radio"/>	1	MF233 copiers	MF233	3	1,000.00 USD

★ Required fields

Save Close

Requisition • 3242453



Assign Cart

Place Order

 Summary P0 Preview Comments 2 Attachments History

1 MF233 copiers MF233 EA 1,000.00 3 EA 3,000.00

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

Linked to Trade-in: Line #2

 Internal Note/Business Justification *no value*
Internal Attachments [Add](#)
 Account Code 141216
 PRINTING AND PUBLISHING EQUIP
External Note *no value*Attachments for supplier [Add](#)

The Trade-In Item will be reflected as a negative dollar line item.

2 MF233 Used Copier MF233 EA -400.00 1 EA -400.00

ITEM DETAILS

Linked to Item: Line #1

Contract: *no value*Internal Note/Business Justification *no value*

Commodity Code 45000000 / Printing, Photographic, Audio and Visual Equipment & Supplies

Internal Attachments [Add](#)Account Code 141216
PRINTING AND PUBLISHING EQUIPExternal Note *no value*Attachments for supplier [Add](#)

Draft (returned)

Total (2,600.00 USD)

Subtotal 2,600.00

2,600.00

What's next for my order?

Next Step Wait for Validation Response

Approvers There are no approvers

Workflow



Draft

 Active
 Robert Requester
 On behalf of: Rachel Requester


Start - Parallel Steps



PR Validation

Future



ITEM DETAILS

Contract: *no value*

Commodity Code: 25101503 / Commercial, Military and Private Vehicles & Components (Automobile)

Account Code: 167900
CAPITAL EQUIPMENT

Internal Note/Business Justification: *no value*

Internal Attachments: [Add](#)

External Note: *no value*

Attachments for supplier: [Add](#)

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.

ITEM DETAILS

Contract: *no value*

Commodity Code: 25101503 / Commercial, Military and Private Vehicles & Components (Automobile)

Account Code: 167900
CAPITAL EQUIPMENT

Internal Note/Business Justification: **asset tag number 123456**

Internal Attachments: [Add](#)

External Note: *no value*

Attachments for supplier: [Add](#)

PO Type Override: **X**

Linked to Item: Line #1



Requisition • 3242453



Assign Cart

Place Order

Summary P0 Preview Comments 2 Attachments History

General

Cart Name Participant

Description *no value*

Priority Normal

Prepared by Robert Requester

Prepared for Rachel Requester

Purchasing Business Unit UOD01 UNIVERSITY OF DELAWARE

eBuilder Process Instance *no value*

Multi-Invoice/Payment ✗

Shipping

Ship To

University of Delaware
Attn: Kristen Pickering
Room: atrium
170 THE GREEN
MEMORIAL HALL
Newark, DE 19716
United States

accounts payable@udel.edu
222 South Chapel Street
Newark, DE 19716
United States

Billing Options

Accounting *no value*

Date

Delivery Options

Expedite ✗

Ship Via Best Carrier-Best Way

Requested *no value*

Delivery Date

Buyer Information

ⓘ User does not have the necessary permissions to view the custom fields associated with this section.

Once all required fields are completed, the requisition is ready to submit.

Don't forget to attach your quote prior to submitting!

2,600.00

What's next for my order?

Next Step Wait for Validation Response

Approvers There are no approvers

Workflow



Draft

Active
Robert Requester
On behalf of: Rachel Requester

Start - Parallel Steps

PR Validation
Future



Requisition • 3242453

Summary P0 Preview Comments 2 **Attachments** History

General		Shipping		Billing	
Cart Name	Participant	Ship To		Bill To	
Description	<i>no value</i>	University of Delaware Attn: Kristen Pickering		Accounts Payable accounts payable@udel.edu	

Once all required fields are completed and you have **attached your quote** the requisition is ready to submit.

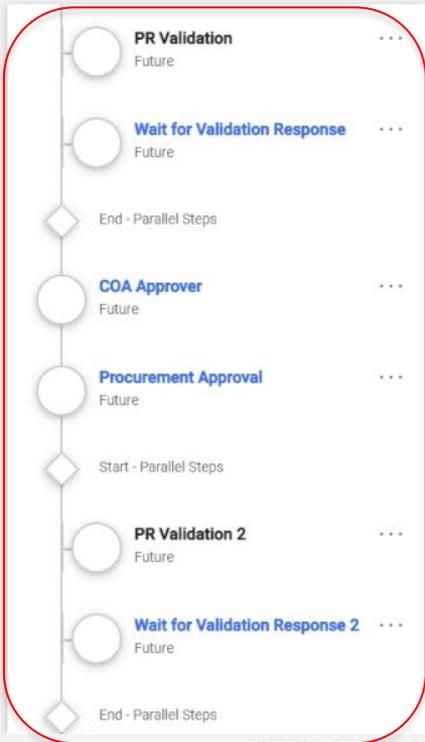
Prior to submitting the requisition, the future approval steps for the requisition are visible in the **sidebar**.

When you are ready to submit, click **Place Order**.

Multi-Invoice/Payment	Requested Delivery Date	<i>no value</i>
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Buyer Information

User does not have the necessary permissions to view the custom fields associated with this section.



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](#)

