**SOP NO:** SOP-PURCH-14  
**SUBJECT:** Trade-In Item on Order  
**SOURCE:** University Procurement Services  
**ORIGINAL DATE OF ISSUE:** 5/2/19  
**DATE OF LAST REVISION:** 6/24/19

**DISCLAIMER:** 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.

**RATIONALE:** 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.

**PROCEDURES:**

**NOTE:**
*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).
*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)

As Departmental User:
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 from this supplier’ link under the supplier information;
Complete the required Trade-In detail (Description, QTY, Unit Price), and any other optional detail that is applicable/known.

After the Trade-in detail is added and saved, ‘Link’ the trade-in item to a purchase line item by checking the box to the right of the Ext Price:

From the Selected Line Item Actions dropdown, click ‘Add Link to Item’, then click the blue Go button
Select the primary line item that the trade in should be linked to:

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:
Complete and Submit the REQ.

To Unlink a trade-in item, click ‘unlink item’ from the Selected Line Items Action dropdown, 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 |