Guidance on ... Internal Trade

The Internal Trade process has five unique criteria which must be met for the transactions to be completed:

1) The total price on the Sales Order must match the total price on the Purchase Order
   - The price on the line items of an Internal Trade Sales Order and Internal Trade Purchase Order don’t need to match exactly – it is the TOTAL price on each order which is important

2) The price should be agreed before an Internal Trade Purchase Order is goods receipted

3) If an Internal Trade Purchase Order has been goods receipted prior to the price being agreed, AND the price is incorrect, the Purchasing Department should:
   a. Cancel the goods receipt (only a uBASE goods receipter can do this)
   b. If the cost is more than the original amount then check that the budget holder (or delegate) is happy to pay the cost associated with this increase (written approval required - email is fine)
   c. Amend the Purchase Order price AND add a ‘Header Text’ note explaining the changes made (include information from the approver). (only a uBASE Purchase Orderer can do this)
   d. Ask a uBASE goods receipter to re-receipt the Purchase Order

4) The process **will fail** if the whole Internal Trade Purchase Order has been deleted, or deleted and then reinstated (using the trash can button)
   - It is **OK** to delete part of an Internal Trade Purchase Order
   - It **will not work** if you delete all of the Internal Trade Purchase Order and then manually add a new line to the same Purchase Order – in this instance you will need to raise a new order by requisitioning through myPurchase

5) If the goods or services detailed on the Internal Trade Purchase and Sales Order are **not required** or are cancelled, then:

   The selling department should:
   a. Reject their Sales Order (see below for the Sales Order is no longer required)
   b. Contact the purchasing department to confirm that the services are cancelled and remind them to cancel their purchase order

   The purchasing department should:
   a) Delete the Purchase Order
   b) Update the Purchase Order text to show why the order has been cancelled
   c) Contact the selling department to confirm that they no longer wish to complete the transaction

**Contacts for help on Internal Trade**

Any queries that are specifically related to sales can be sent via email to sales-finance@sheffield.ac.uk. General queries about Internal Trade please email mypurchaseubase@sheffield.ac.uk, or help and discussions can also be found in uSpace here.