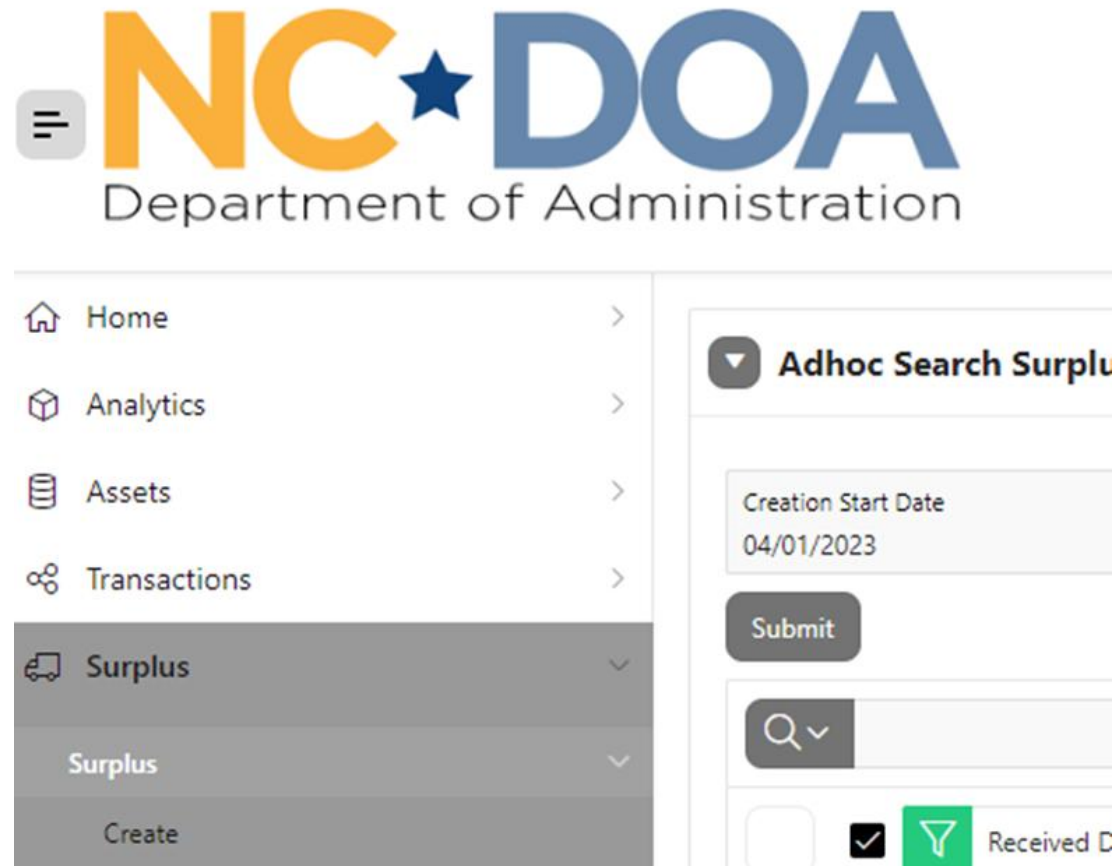


How to Create a Send To Surplus Entry in AssetWorks



The Send To Surplus Method is for items you want to send to the State Surplus warehouse in Raleigh.

From the Home screen in AssetWorks, **click on Surplus**, then **Create**.



Under Surplus Method, click **Send to Surplus** from the drop-down box



A screenshot of a web application interface. On the left is a vertical navigation menu with items: Home, Analytics, Assets, Transactions, Surplus (highlighted), Surplus, Create, and Batch Receive. The main content area is titled "Create Surplus Transfer" and contains several form fields: "Surplus Method *", "From Agency *", "From Division *", "Budget Code", "Recycling Contractor", "Notes/Comments", "-- Property Location", and "Building". The "Surplus Method *" field has a dropdown menu open, showing options: Agency Sale, LE Retirement, Promote Only, Recycle, Sell On-Site, Send to Surplus (highlighted with a red arrow), Trade-In, and Trash (worthless).

From Agency: Click on the list icon on the right side of the text box and **select which agency is selling the item.**

From Division: Click on the list icon on the right side of the text box and **select which division is selling the item.**

Budget Code: This comes from your fiscal office and determines where the funds from the sale are directed. If you are with a school or municipality that doesn't have a budget code, you may enter zeros.

Recycling Contractor: **Leave blank.**

Notes/Comments: **Enter the mailing address/MSD number where you would like the labels for the item(s) sent.**

Property Location: **Leave blank.**

Read through the **Hazardous Materials and Sensitive Data** information and **click on the box that you agree to the terms and conditions.**

Click **Create**

Under Add Assets, **click Create New Asset.**

NC DOA
Department of Administration

- Home
- Analytics
- Assets
- Surplus**
 - Surplus
 - Create**
- Reports

Surplus Detail

Surplus Number	S-23-68447	-- Property Location --	
Creation Date	07/25/2023	Building	
Submit Approval Date		Room	
Submit Approval User		Address 1	123 Main St
Surplus Method	Agency Sale	Address 2	
From Agency	DEPARTMENT OF HEALTH & HUMAN SERVICES	City	Raleigh
From Division	DHHS - CENTRAL ADMINISTRATION - ADMINISTRATION	State	NORTH CAROLINA
Budget Code	12345	Zip	27607
Recycling Contractor		County	Wake
Notes/Comments		Contact Name	Darla Brown
-- Preparer Information --		Contact Phone	9198145602
Preparer Name	DARLA TEST	Contact Email	darla.brown@doa.nc.gov
Preparer Phone	(555) 555-5555	Location Notes	
Preparer Email	DONOTEMAIL1@EMAIL.COM	-- Surplus Information Only--	
		Pickup Contact Name	
		Pickup Contact Phone	
		Pickup Contact Email	
		Pickup/Delivery Method	
		Pickup Location Notes	
		Agency Labels Sent	

[Edit](#) [Pickup Labels](#)

Add Assets

[Create New Asset](#)

The Item Number auto populates.

NC Asset Number – Enter the Fixed Asset Number if there is one.

Class: Click the list icon on the right side of the text box and **select the class that matches** the item most closely. You can type the item into the Search box to help find the class. Most items will start with MISC, but vehicles will start with VEH and recycle will start with REC.

Description: **Create a title for the item** such as “Solid Wood Desk with File Drawers”.

Additional Description: Enter additional details about the appearance/condition of the item. It is important to be transparent about visual and mechanical defects.

Quantity: Always 1

UoM (Unit of Measure): Always Each

Minimum Price: **Leave blank** – the price will be determined at the Surplus Department.

If it's a vehicle, enter the information in the **Vehicles** field.

If it's a boat, enter the information in the **Marine Equipment** field.

Summary: Enter any info you have on the item.

Original Acquisition: Enter the original purchase date and amount. If you do not know them, enter an estimate and notate that it's an estimate in the **Notes** field.

Click Save & Done.

-- Notes --

Notes 1

Notes 2

Notes 3



You will now be at the Surplus Detail screen and will be able to see everything you entered. At the bottom of the screen, you will see the Item Number, Asset Number, Description, Price, and Status.

If you want to add another item to the transfer, **click Create New Asset**. You can add up to 50 items to each transfer.

If you are sending computer items to the Surplus warehouse, there are certain instances where you may enter them as a "lot" of several items. If you are interested in sending them as a lot, please contact the person in charge of the Computer Warehouse listed on the NC State Surplus Property Agency's "Who to Contact with Questions" document.

Once all items for the transfer are entered,
click Submit For Approval

Edit Submit For Approval Pickup Labels

▼ Add Assets



Create New Asset

Assets				Documents & Images									
View	Item Number	NC Asset Number	Description	Min Price	Qty Sent	Qty Rcvd	Sales Price	Scrap/Trash	Status	Receiver	Recv Date	Approve Date	Docs/Images
	S-23-68490-001-NT	5748452	Solid wood desk with file drawers	-	1	-	-	-	In Transfer	-	-	-	1

This is your confirmation that it was successfully submitted.

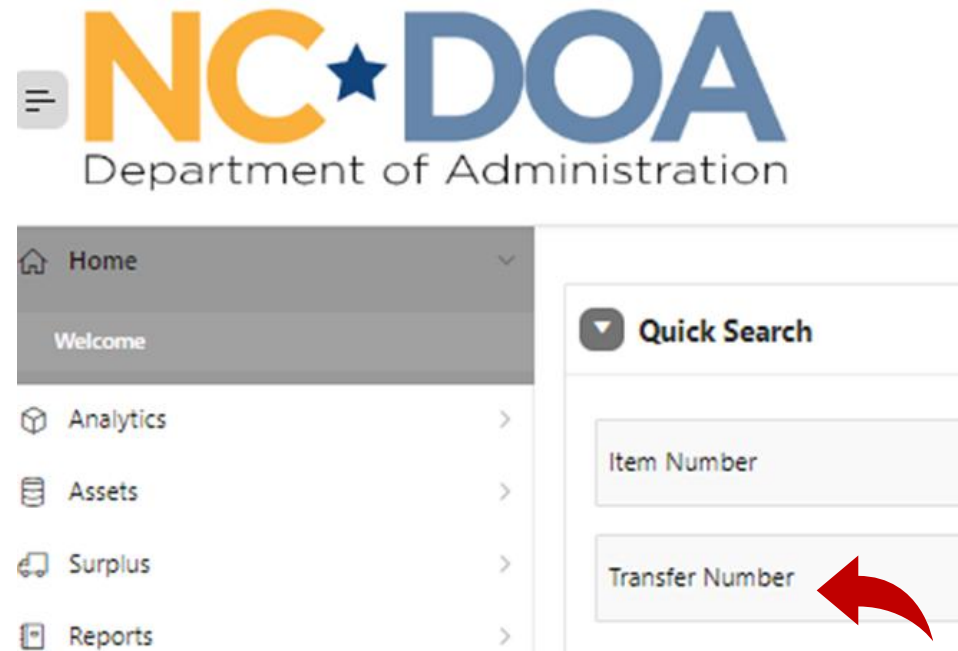


Your surplus has been submitted for approval.

IF YOU ARE AN AGENCY APPROVER...

You will receive an email letting you know you have a transfer to approve.



You may enter the Transfer Number into the Search box on the Home screen.




Or you could **click on Surplus** from the Home screen.

The screenshot displays the NC DOA (Department of Administration) Home screen. At the top, the logo features 'NC' in orange, a blue star, and 'DOA' in blue, with 'Department of Administration' written below. A navigation menu on the left includes 'Home', 'Analytics', 'Assets', 'Surplus', and 'Create'. The 'Surplus' menu item is highlighted in grey, and a red arrow points to it. To the right, the 'Adhoc Search Surplus Transfers' section is visible, containing a 'Creation Start Date' field with the value '04/01/2023', a 'Submit' button, and a search bar with a 'Go' button.

If there is not a Y in the Approved Flag field, it is waiting to be approved.




View/Edit	Surplus Transfer Number	Creation Date ↓	From Agency	From Person	Method	Remarks	Item Number	Serial Number	Asset Description	Approved Flag
	S-23-68490	08/25/2023	00182 - DEPARTMENT OF HEALTH & HUMAN SERVICES	DARLA TEST	Send To Surplus	-	S-23-68490-001-NT	-	Solid wood desk with file drawers	-

Click on the **View/Edit** icon to select that transfer.

Review the information to make sure it looks correct.

Assets					Documents & Images				
View	Item Number	NC Asset Number	Description	Min Price	Qty Sent	Qty Rcvd	Sales Price	Scrap/Trash	Status
	S-23-68490-001-NT	5748452	Solid wood desk with file drawers	-	1	-	-	-	In Transfer

Click on Agency Manager Approve/Reject

 **Approve Assets**

Item Number	Description	Approve Status
S-23-68490-001-NT	Solid wood desk with file drawers	Agency Manager Pending

[Download](#)

row(s) 1 - 1 of 1

Agency Manager Approve/Reject



Click on each item you want to approve or click on the [+] icon to select all the items.

Click on **Approve**.

If you need to reject one, click it and hit Reject. When any item is rejected, a **Reject Reason** is required because the person that entered it will need to create a new transfer with the issue corrected.

Approval Detail

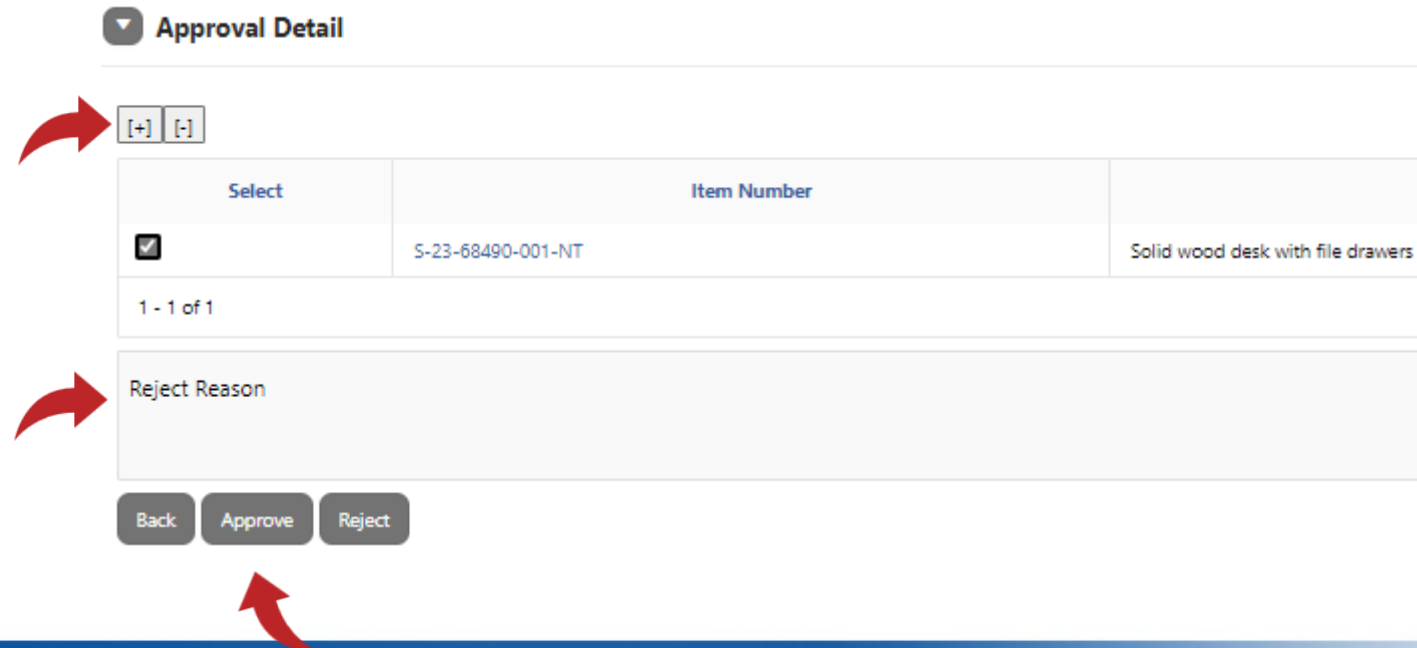
[+] [-]

Select	Item Number	
<input checked="" type="checkbox"/>	S-23-68490-001-NT	Solid wood desk with file drawers

1 - 1 of 1

Reject Reason

Back Approve Reject



You will now see that the item is Approved.

▼ Approve Assets

Item Number	Description	Approve Status	Agency Manager Approver	Agency Manager Date	Reject Reason
S-23-68490-001-NT	Solid wood desk with file drawers	Approved	DARLA TEST	08/25/2023	-



Once the Agency Approver has approved the submission, it will be reviewed and received by the NC Division of Surplus.

THANK YOU!

ssp.info@doa.nc.gov

919-814-5600