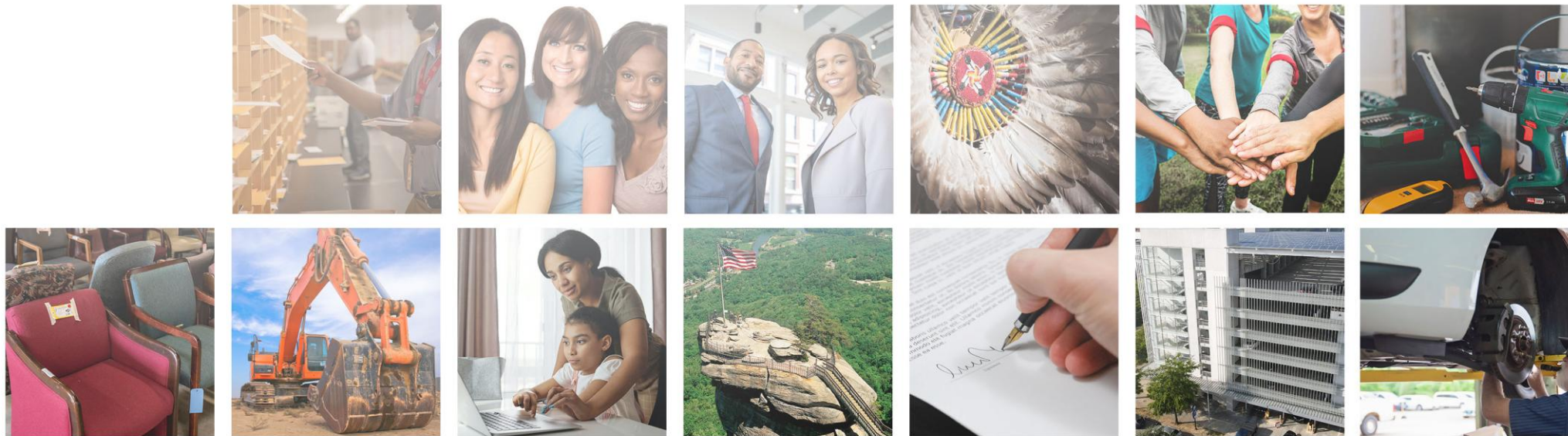


# How to Create a Trade-In Entry in AssetWorks

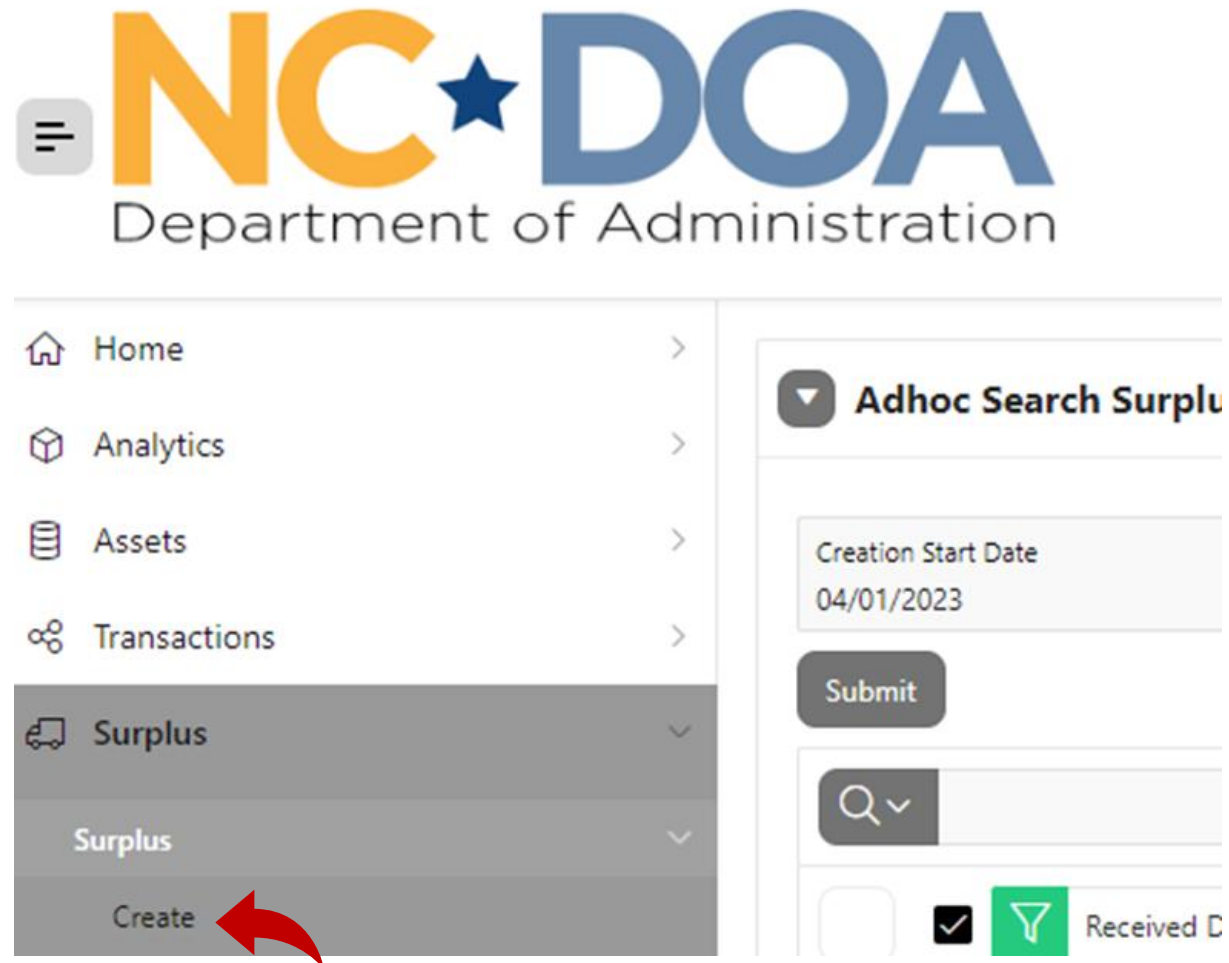


# Trade-In entries are for when an agency is receiving value from the vendor for an asset that can be used towards the purchase of a new asset.

From the Home screen in AssetWorks, click on Surplus.



Under Surplus, click **Create**



The screenshot displays the NC DOA Department of Administration website. The header features the NC DOA logo and the text "Department of Administration". A navigation menu on the left includes links for Home, Analytics, Assets, Transactions, Surplus, and a sub-menu for Surplus. The sub-menu for Surplus is expanded, showing a "Create" button highlighted with a red arrow. On the right side of the page, there is a section titled "Adhoc Search Surplus" with a "Creation Start Date" field set to "04/01/2023", a "Submit" button, and a search bar. Below the search bar, there are checkboxes for "Received D".

Under Surplus Method, **click Trade-In** from the drop-down box

The screenshot displays the NCDOA Department of Administration web application interface. On the left is a navigation sidebar with the following items: Home, Analytics, Assets, Transactions, Surplus (highlighted), Surplus, Create, and Batch Receive. The main content area is titled 'Create Surplus Transfer'. It contains several input fields: 'Surplus Method \*' (a dropdown menu), 'From Agency \*', 'From Division \*', 'Budget Code', 'Recycling Contractor', 'Notes/Comments', and '-- Property Location'. The 'Surplus Method \*' dropdown is open, showing a list of options: Agency Sale, LE Retirement, Promote Only, Recycle, Sell On-Site, Send to Surplus, Trade-In (highlighted with a red arrow), and Trash (worthless). The 'Batch Receive' option is visible at the bottom of the sidebar.

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

**From Division:** Click on the list icon on the right side of the text box and **select which division is trading in 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:** **Leave blank.**

**Property Location:** **Enter the location** where the item is located and the **Contact name, phone number, and email of the custodian** of this item (the person who can answer questions).

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	<b>-- Property Location --</b>	
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
<b>-- Preparer Information --</b>		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	<b>-- Surplus Information Only--</b>	
		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.

**Description:** Create a title for the item such as “Fitness Equipment”.

**Additional Description:** Provide justification for trade-in rather than selling the item(s) on auction.

**Quantity:** Always 1

**UoM (Unit of Measure):** Always Each

**Minimum Price:** Leave blank.

**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.

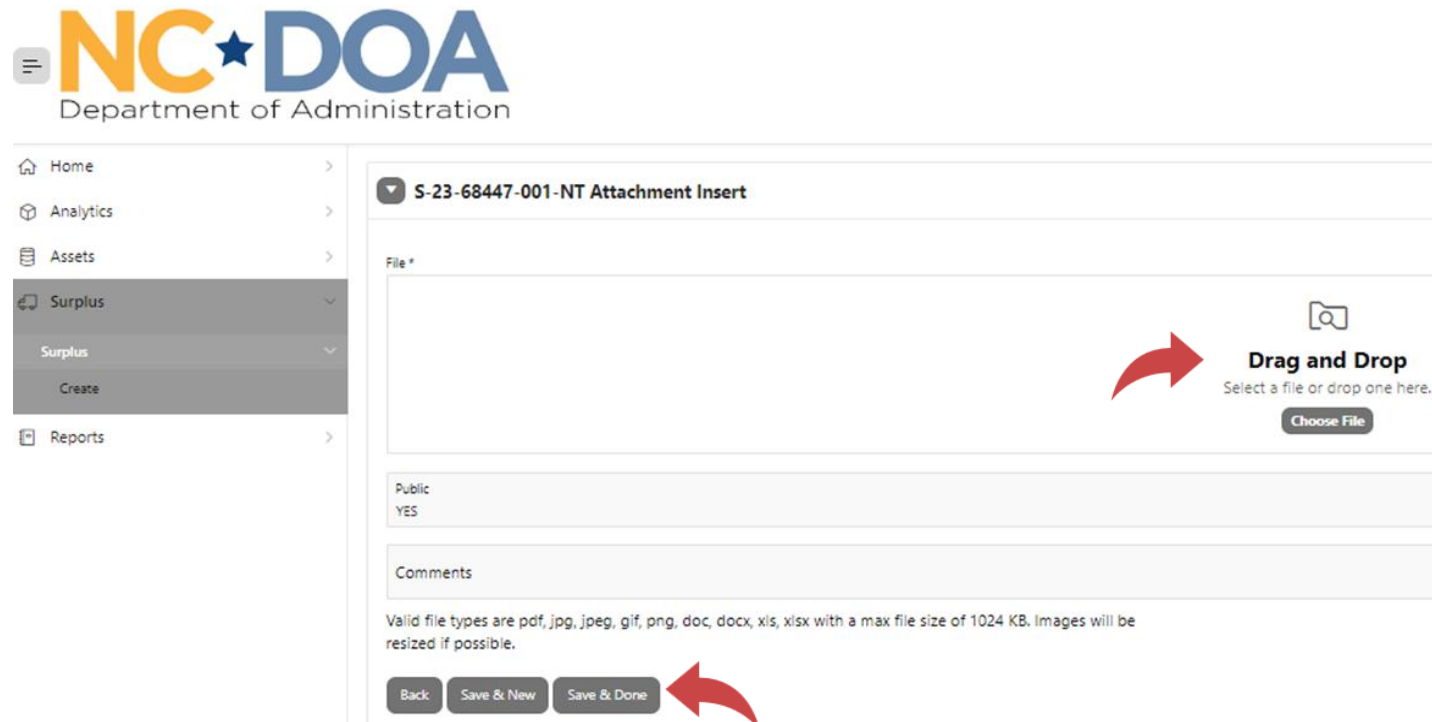


**Click Save & Add Images.**

Every asset/item must have at least one attachment which can be a picture of the item or the trade-in quote.

**Drag and Drop** attachment or **click Choose File** to upload it from computer.

**Click Save & Done.**



The screenshot displays the NC DOA Department of Administration web application. On the left is a navigation sidebar with links for Home, Analytics, Assets, Surplus (highlighted), Surplus, Create, and Reports. The main content area is titled "S-23-68447-001-NT Attachment Insert". It features a large file upload area with a red arrow pointing to it and the text "Drag and Drop" and "Select a file or drop one here." Below this is a "Choose File" button. Further down are fields for "Public" (set to YES) and "Comments". At the bottom, there are three buttons: "Back", "Save & New", and "Save & Done", with a red arrow pointing to the "Save & Done" button. A note at the bottom states: "Valid file types are pdf, jpg, jpeg, gif, png, doc, docx, xls, xlsx with a max file size of 1024 KB. Images will be resized if possible."



Click on Documents & Images, then Insert File to attach the quote detailing the new assets being purchased and their price(s), the old assets being traded in and the value to be received, and the cost of the new asset(s) after the trade-in value is deducted. Quote must NOT be expired.

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-23-68495-001-NT	156456456	Fitness Equipment	-	1	-	-	-	In Transfer	-	-	-	1

Assets

Documents & Images

No data found

Insert File

Drag and Drop attachment or click Choose File to upload it from computer.

Click Save & Close.

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

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

You may choose to enter the Trade-In as a “lot” of several items instead of listing each item separately. However, you will want to include a list of the items and their Fixed Asset Numbers on an attached Excel spreadsheet for reference for any future auditing purposes. Please be aware that attachments are not a searchable field, so it is recommended that to track specific items, you’ll need to enter the Fixed Asset Number or Serial Number in the Additional Description field.

Once all items for the transfer are entered,  
**click on 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-23-68495-001-NT	156456456	Fitness Equipment	-	1	-	-	-	In Transfer	-	-	-	1

This is your confirmation that it was successfully submitted.

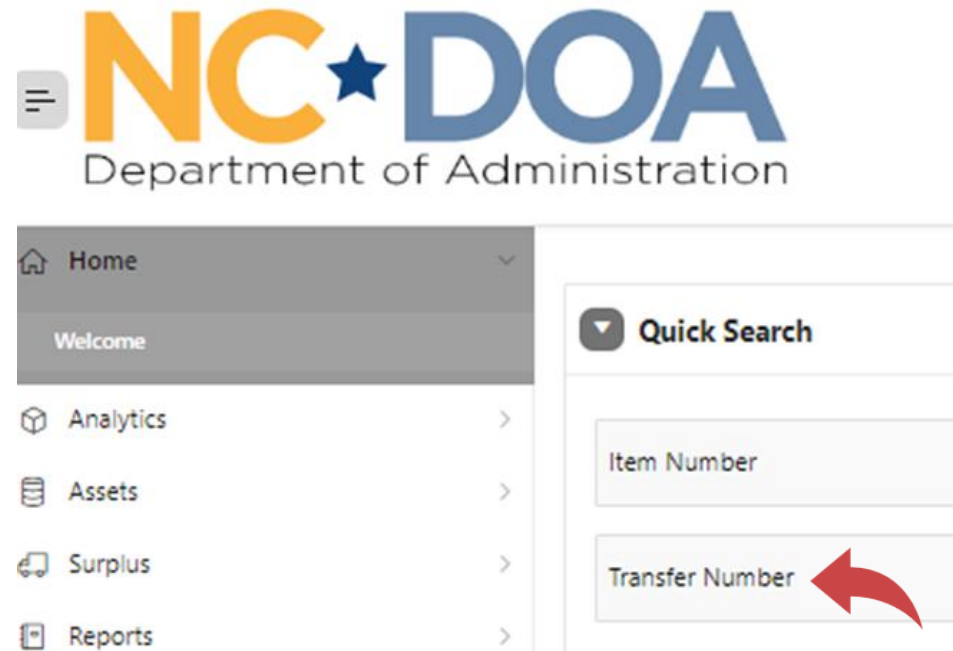


**Your surplus has been submitted for approval.**

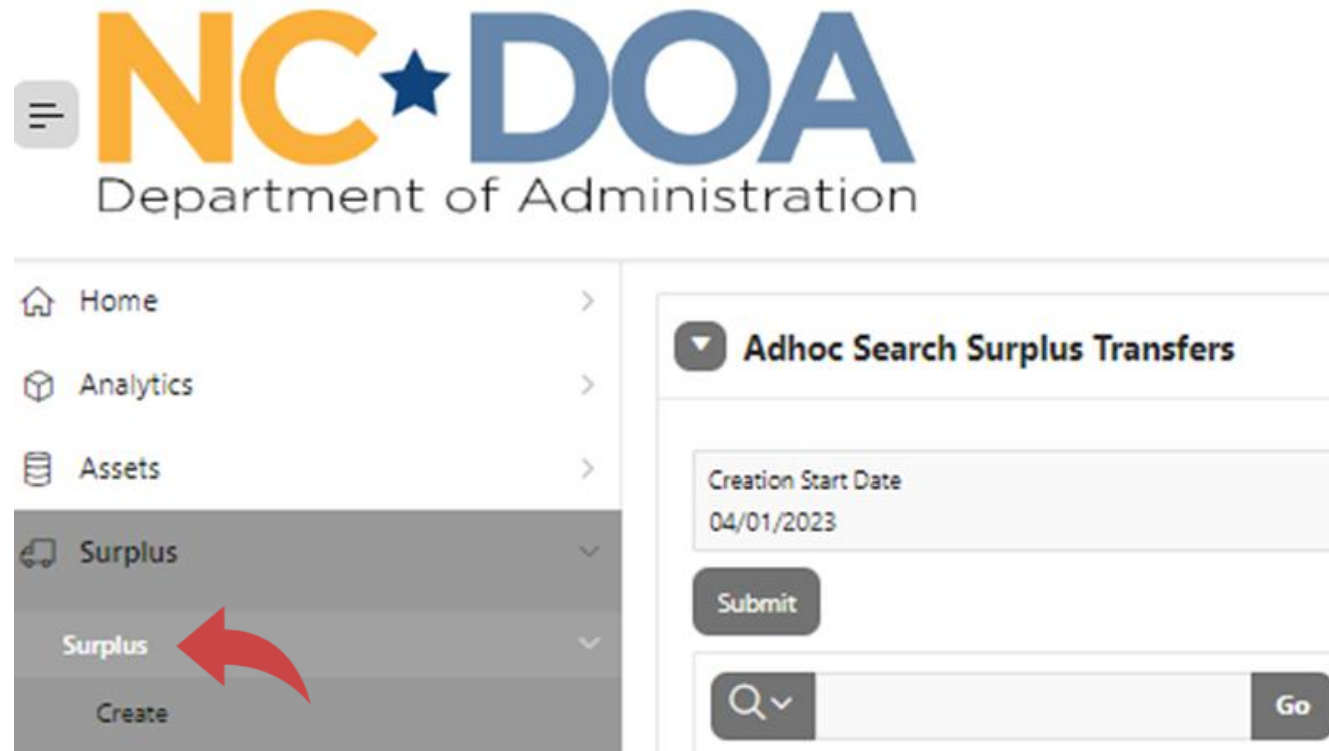
## IF YOU ARE AN AGENCY APPROVER...

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.



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-23-68495	09/01/2023	00182 - DEPARTMENT OF HEALTH & HUMAN SERVICES	DARLA TEST	Trade-In	-	S-23-68495-001-NT	-	Fitness Equipment	-

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

Review the information to make sure it looks correct.

Click on Documents & Images to check the quote.

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-23-68495-001-NT	156456456	Fitness Equipment	-	1	-	-	-	In Transfer	-	-	-	1

Click on Agency Manager Approve/Reject

▼

Approve Assets

Item Number	Description	Approve Status
S-23-68495-001-NT	Fitness Equipment	Agency Manager Pending

Download

row(s) 1 - 1 of 1

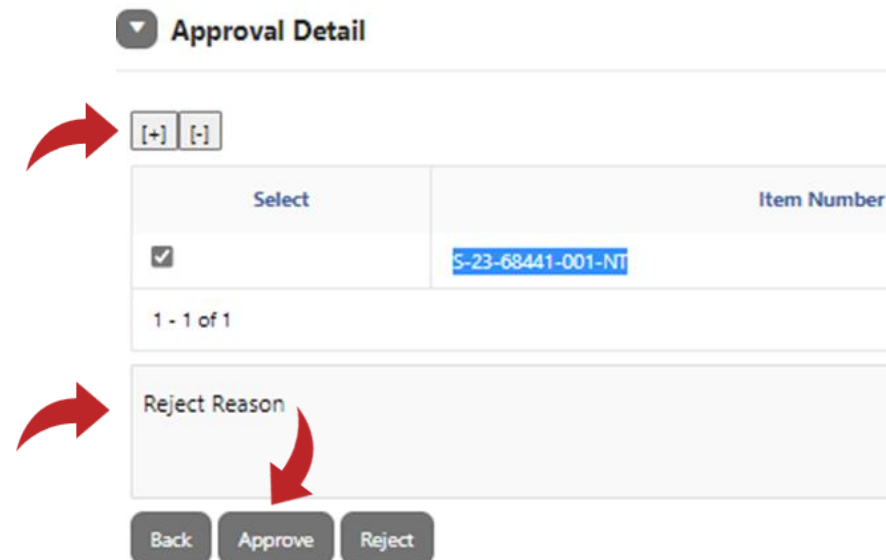
Agency Manager Approve/Reject



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.



The screenshot shows a web form titled "Approval Detail". At the top, there is a dropdown menu. Below it, there are two buttons: "[+]" and "[-]". A red arrow points to these buttons. Below the buttons is a table with two columns: "Select" and "Item Number". The table contains one row with a checked checkbox in the "Select" column and the item number "S-23-68441-001-NT" in the "Item Number" column. Below the table, it says "1 - 1 of 1". Below that is a text area labeled "Reject Reason". A red arrow points to this text area. At the bottom of the form are three buttons: "Back", "Approve", and "Reject". A red arrow points to the "Reject" button.

Select	Item Number
<input checked="" type="checkbox"/>	S-23-68441-001-NT

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
S-23-68495-001-NT	Fitness Equipment	Approved	DARLA TEST	09/01/2023



**THANK YOU!**

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**919-814-5600**