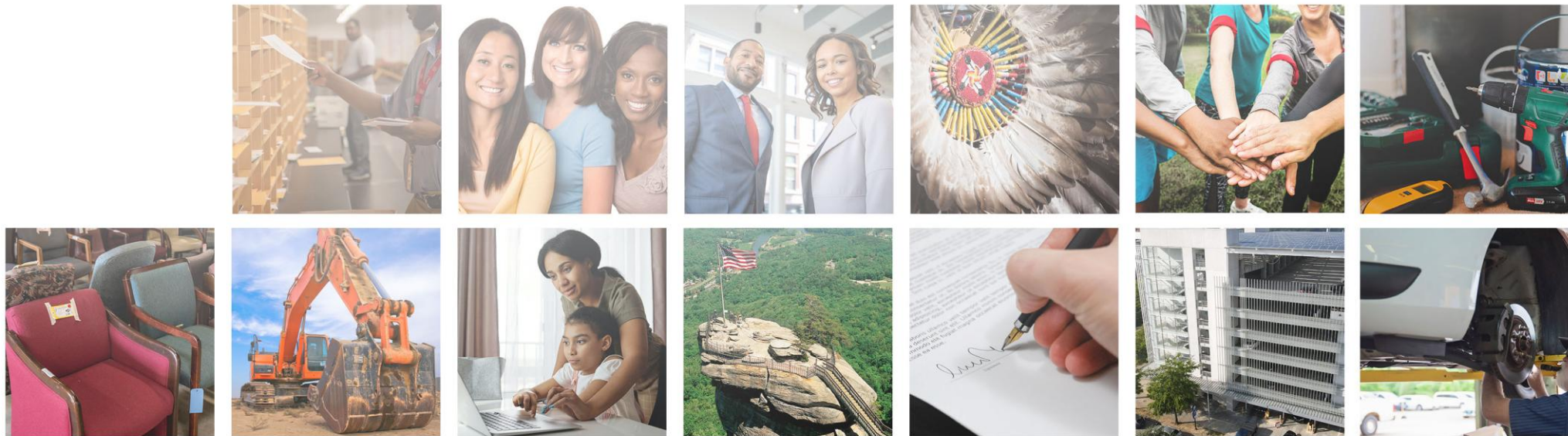


How to Create an Agency Sale Entry in AssetWorks

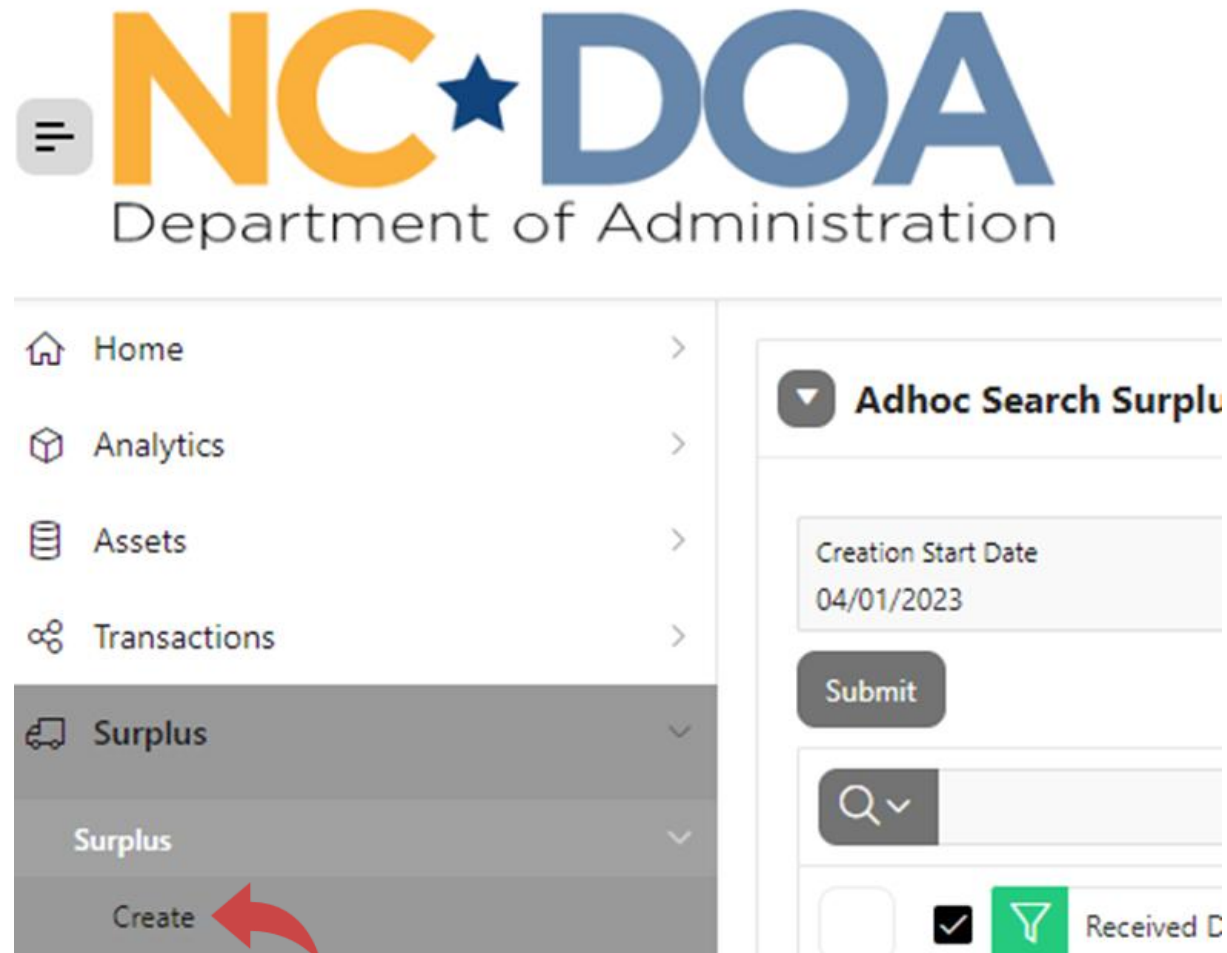


Agency Sales are between two state agencies, municipalities, or approved nonprofits that have already agreed to the terms of purchase for an item

From the Home screen in AssetWorks, click on Surplus.



Under Surplus, click **Create**



Under Surplus Method, click **Agency Sale** from the drop-down box



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

NCDOA
Department of Administration

Home >
Analytics >
Assets >
Transactions >
Surplus >
Surplus >
Create
Batch Receive

Create Surplus Transfer

Surplus Method *
From Agency *
From Division *
Budget Code
Recycling Contractor
Notes/Comments
-- Property Location
Building

Agency Sale
LE Retirement
Promote Only
Recycle
Sell On-Site
Send to Surplus
Trade-In
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: **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	-- 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.

Description: Create a title for the item such as “White Kenmore Refrigerator”.

Additional Description: Additional details about the appearance/condition of the item are not necessary as it will be listed on the attached Purchase Agreement.

Quantity: Always 1

UoM (Unit of Measure): Always Each

Minimum Price: Enter the price of the item (or leave it blank as the invoice also will show the price).

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 & Add Images.

Every item must have at least one attachment. For an Agency Sale, add at least one image as well as a purchase agreement with the details of the asset(s), selling agency, buying agency, date, and amount of sale.

Vehicle Sales must include these specific pictures:

- The front, back, and sides of outside of the vehicle to provide a 360-degree view of the entire vehicle.
- The inside of the vehicle, usually from the open driver's side door.
- The odometer.
- The dashboard VIN.
- The last 6 digits of the VIN written on the outside of the vehicle OR the VIN typed on a piece of paper and taped inside the windshield.

All Agency Sales require a Purchase Agreement

- The purchase agreement must include a list of items being purchased and dialog stating that the purchasing agency agrees to buy the listed asset(s) at a specified price that is also shown.
- Tax will be charged unless the purchasing agency has an E-595E form on file with us.
- The agreement must include the agency that is purchasing the items and contact information for the approved purchaser for the agency.
- The agreement can be a signed form, or it can be an exchange of official emails outlining the sale and agreement.
- The price should be fair market value as agreed upon between the two parties.


**Drag and Drop image or click Choose File to upload it from computer.
Click Save & New to add another image or the purchase agreement.**

NC DOA
Department of Administration

Home >
Analytics >
Assets >
Surplus >
Surplus >
Create
Reports >

S-23-68447-001-NT Attachment Insert

File *

 **Drag and Drop**
Select a file or drop one here.
Choose File

Public
YES

Comments

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.

Back **Save & New** **Save & Done**

When all images and the purchase agreement are uploaded, click Save & Done.

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, Status, and the number of Documents.

If you want to view or add to the documents, click on the number under Docs/Images.

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

You may choose to enter your Agency Sale as a “lot” of several items instead of listing each item separately. However, you will want to include a list of the items 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**

EditSubmit For ApprovalPickup 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-23-68447-001-NT	12345	White Freezer	\$100.00	1	-	-	-	In Transfer	-	-	-	2

This is your confirmation that it was successfully submitted.

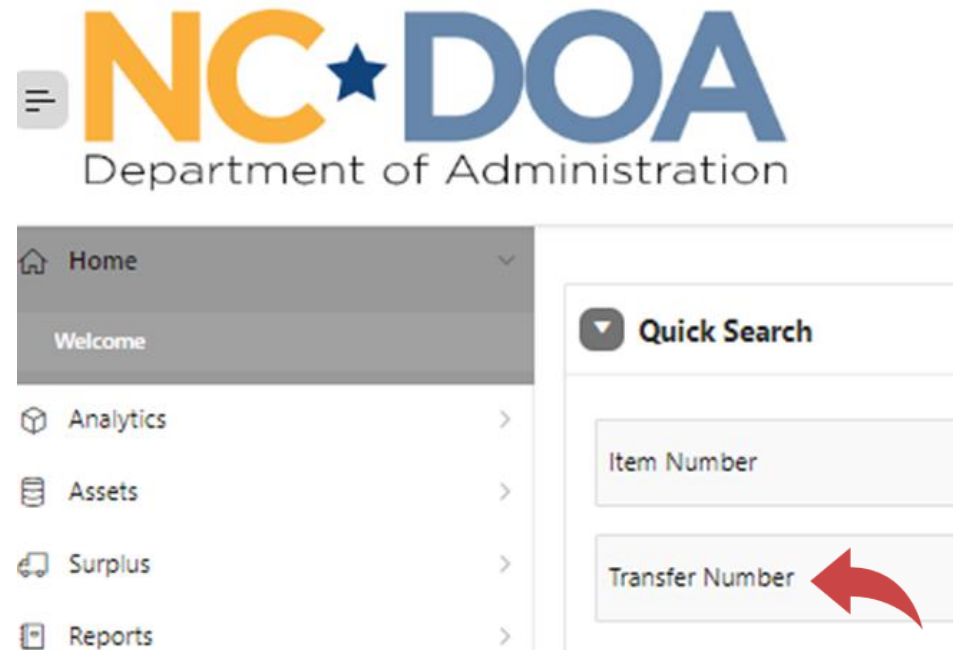


Your surplus has been submitted for approval.

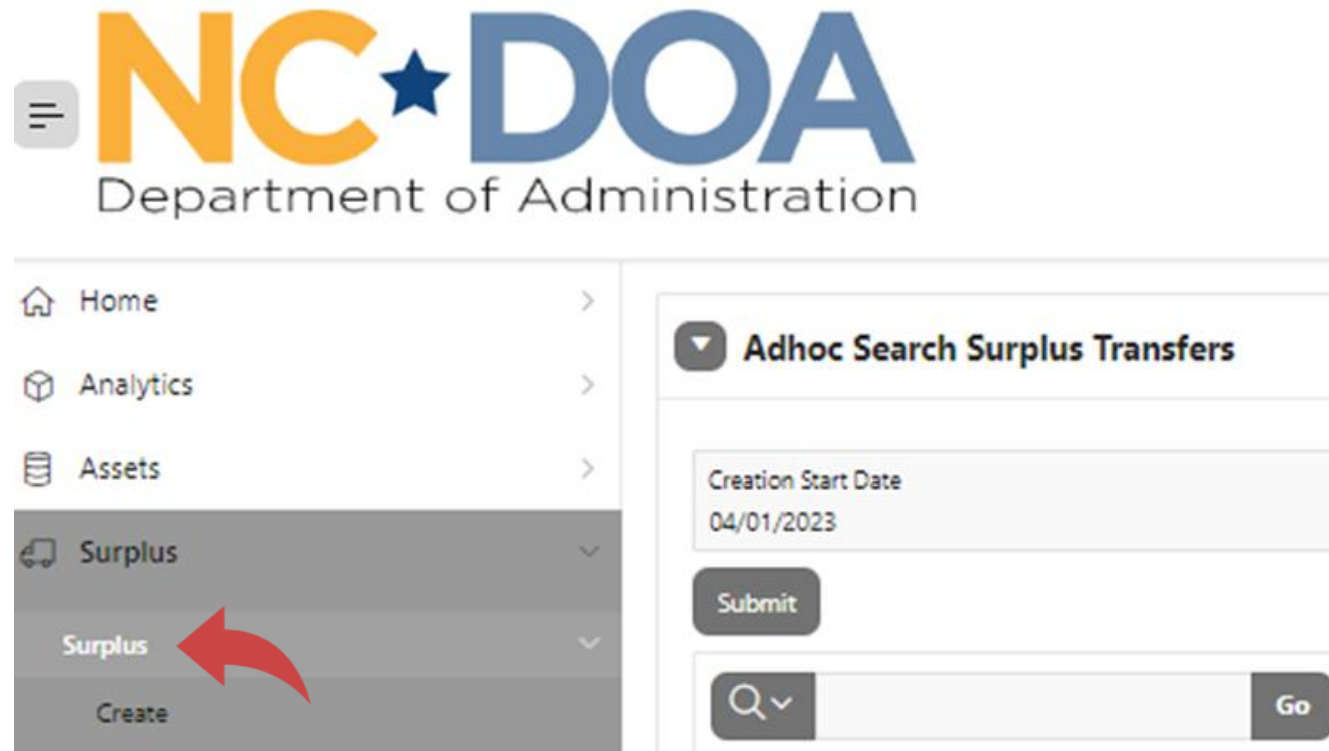
IF YOU ARE AN AGENCY APPROVER...

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-23-68449	07/25/2023	00182 - DEPARTMENT OF HEALTH & HUMAN SERVICES	DARLA TEST	Agency Sale	-	S-23-68449-001-NT	-	Single Hospital Bed	-
	S-23-68447	07/25/2023	00182 - DEPARTMENT OF HEALTH & HUMAN SERVICES	DARLA TEST	Agency Sale	-	S-23-68447-001-NT	-	White Freezer	-

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

Review the information to make sure it looks correct.

Click on the number under Docs/Images to view the pictures.

Assets				Documents & Images							History		
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-23-68451-001-NT	1321546	Springfield Hellcat 9mm Black Micro Compact Pistol	\$1.00	1	-	-	-	In Transfer	-	-	-	1
	S-23-68451-002-NT	12345643	Springfield Hellcat 9mm Black Micro Compact Pistol	\$1.00	1	-	-	-	In Transfer	-	-	-	1

Click on Agency Manager Approve/Reject

▼

Approve Assets

Item Number	Description	Approve Status
S-23-68449-001-NT	Single Hospital Bed	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 input field labeled "Reject Reason". A red arrow points to this field. 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	Reject Reason
S-23-68441-001-NT	Chair - broken beyond repair	Approved	DARLA TEST	07/26/2023	-



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

Once approved from the Surplus Division, an invoice will be created and sent to the submitter and the purchasing agency's contact person.

Once payment is received and processed by the NC Division of Surplus, the property can then be released.

THANK YOU!

ssp.info@doa.nc.gov
919-814-5600