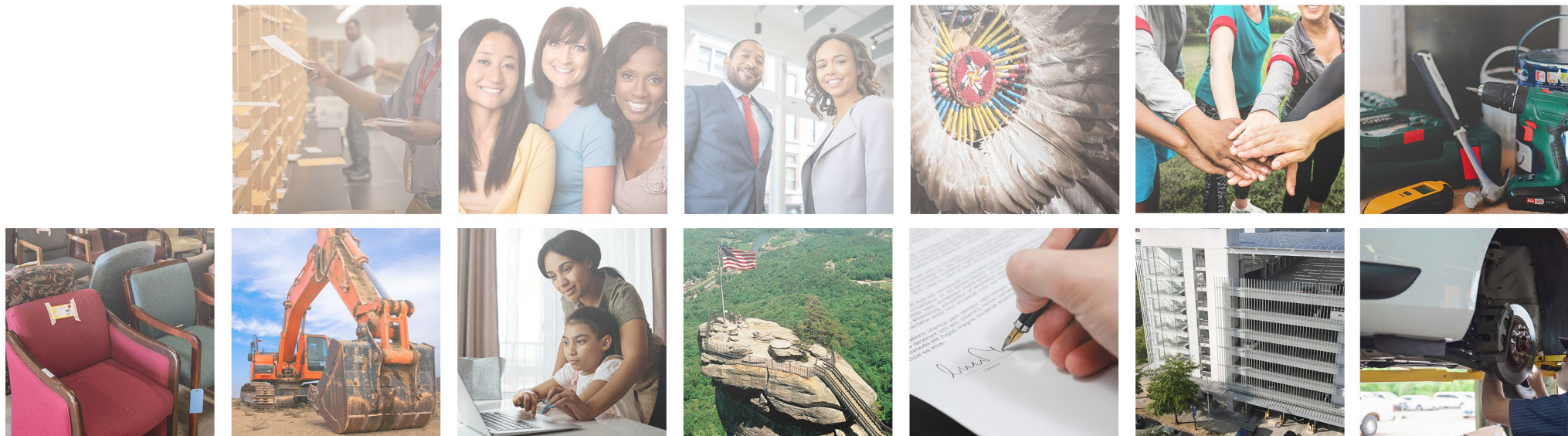
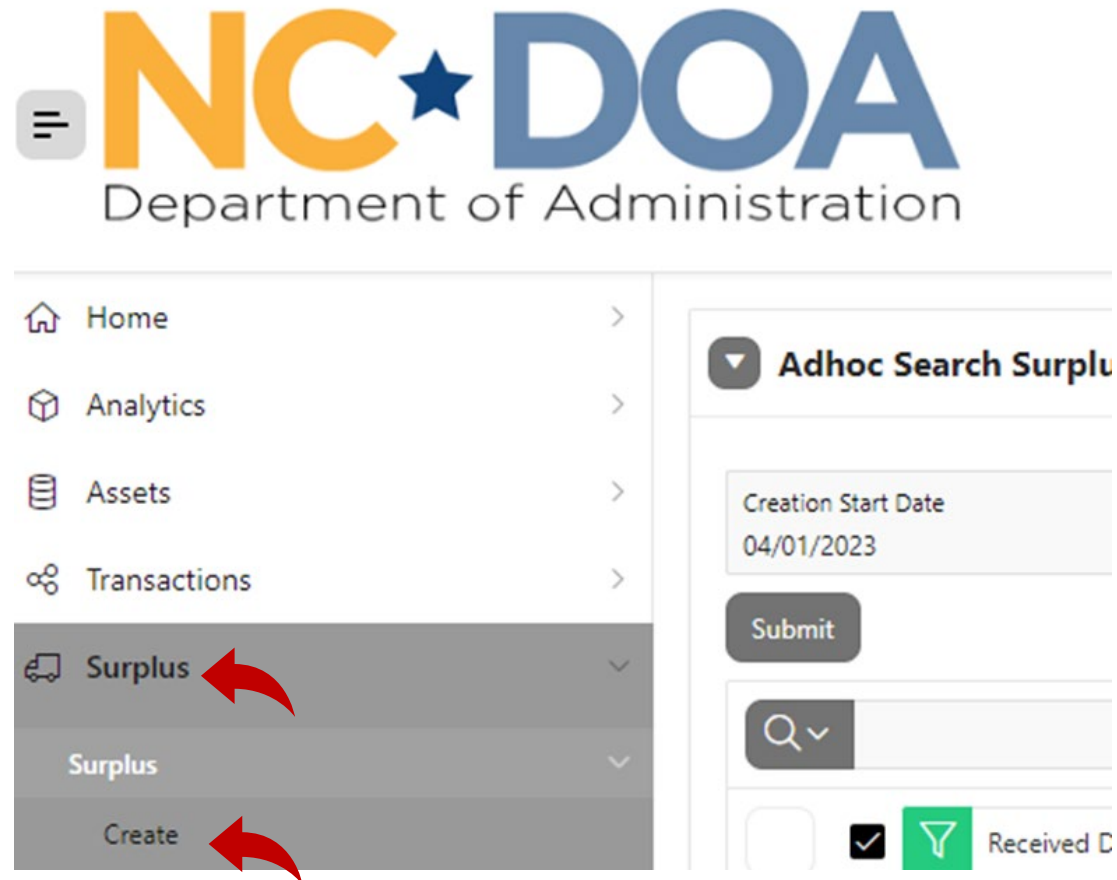


# How to Create a Sell On Site Entry in AssetWorks



# The Sell On Site Surplus Method is for items you want to auction while keeping them at your location.

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



Under Surplus Method, click **Sell On Site** 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 \*" dropdown menu is open, showing a list of options: Agency Sale, LE Retirement, Promote Only, Recycle, Sell On-Site (indicated by a red arrow), Send to Surplus, 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:** **Leave blank.**

**Property Location:** **Enter the address** of the items(s) including the county as well as the **Contact name, phone number, and email of the custodian** of this item (the person who can answer questions and schedule viewing and/or pickup).

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**.



- 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 “White Kenmore Refrigerator”.

**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:** **Enter the minimum price** for the item (if you leave it blank, the minimum price will default to \$1).

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 a Sell On Site transfer, add at least one clear image of each item.

Each asset must have a photo of the actual item (not a similar item), not include any personal items or debris/trash in the background, The more photos of various angles, the better.

## ***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.

**\*\*\*A vehicle cannot be listed until the Surplus Department receives the title, but agencies can enter the vehicle into AssetWorks while they are in the process of sending the title to the Department of Surplus.\*\*\***



**Drag and Drop** the image or click **Choose File** to upload it from the computer.  
**Click Save & New** to add another image.  
**Click Save & New Asset** to add another asset to this transfer.

The screenshot displays the NC DOA (Department of Administration) web application interface. On the left is a navigation menu with options: 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 'File\*' upload area with a 'Drag and Drop' instruction and a 'Choose File' button, which is pointed to by a red arrow. Below the upload area 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 of the form 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.'

When all assets and images 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 Create New Asset**. 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 with their Fixed Asset Number or Serial Number in the Additional Description field.

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						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-23-68488-001-NT	4654231	White Kenmore Refrigerator	-	1	-	-	-	In Transfer	-	-	-	1

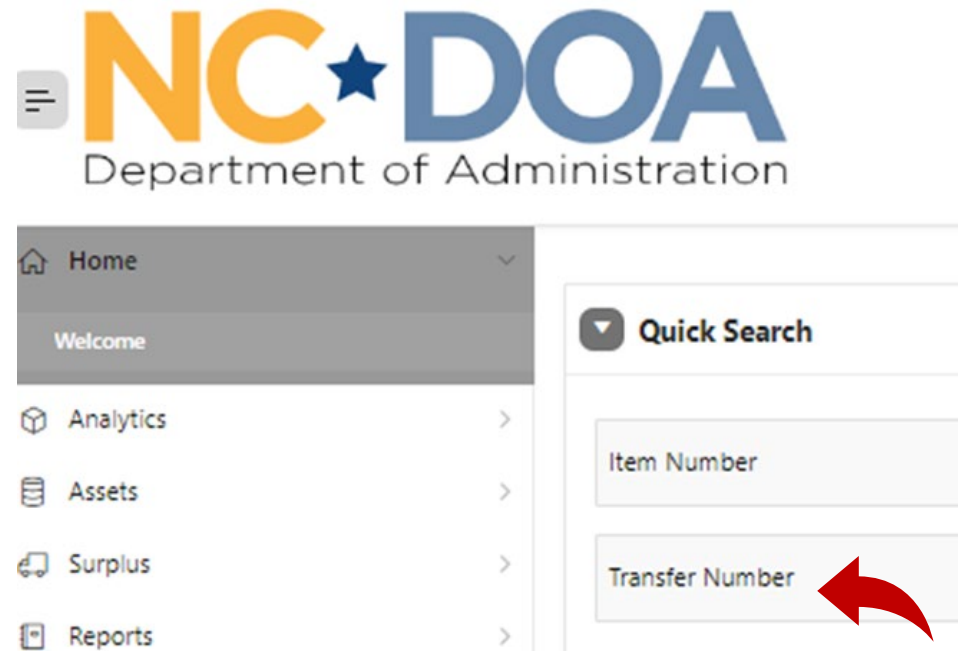
This is your confirmation that it was successfully submitted.



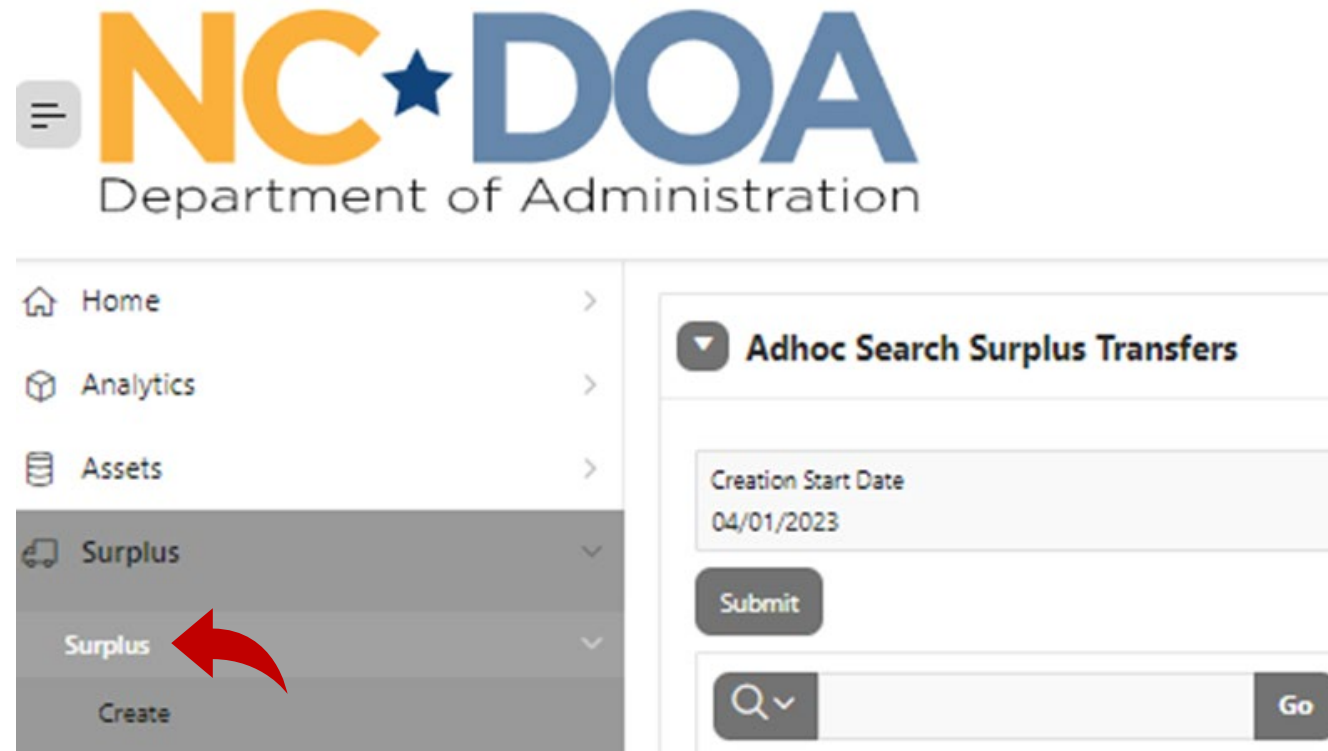
## IF YOU ARE AN AGENCY APPROVER...

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-23-68488	08/22/2023	00182 - DEPARTMENT OF HEALTH & HUMAN SERVICES	DARLA TEST	Sell On-Site	123 Main St	S-23-68488-001-NT	-	White Kenmore Refrigerator	-

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								
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-23-68488-001-NT	4654231	White Kenmore Refrigerator	-	1	-	-	-	In Transfer	-	-	-	1



Click on Agency Manager Approve/Reject

**Approve Assets**

Item Number	Description	Approve Status
S-23-68488-001-NT	White Kenmore Refrigerator	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 interface for 'Approval Detail'. At the top, there is a dropdown arrow and the text 'Approval Detail'. Below this, there are two small buttons: '[+]' and '[-]'. A red arrow points to these buttons. Below the buttons is a table with a 'Select' column and a data column. The table contains one row with a checkbox in the 'Select' column and the ID 'S-23-68488-001-NT' in the data 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, there are three buttons: 'Back', 'Approve', and 'Reject'. A red arrow points to the 'Approve' button.

Select	
<input type="checkbox"/>	S-23-68488-001-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-23-68488-001-NT	White Kenmore Refrigerator	Approved	DARLA TEST	08/22/2023	-



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

**THANK YOU!**

**Darla Brown**

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**919-814-5602**