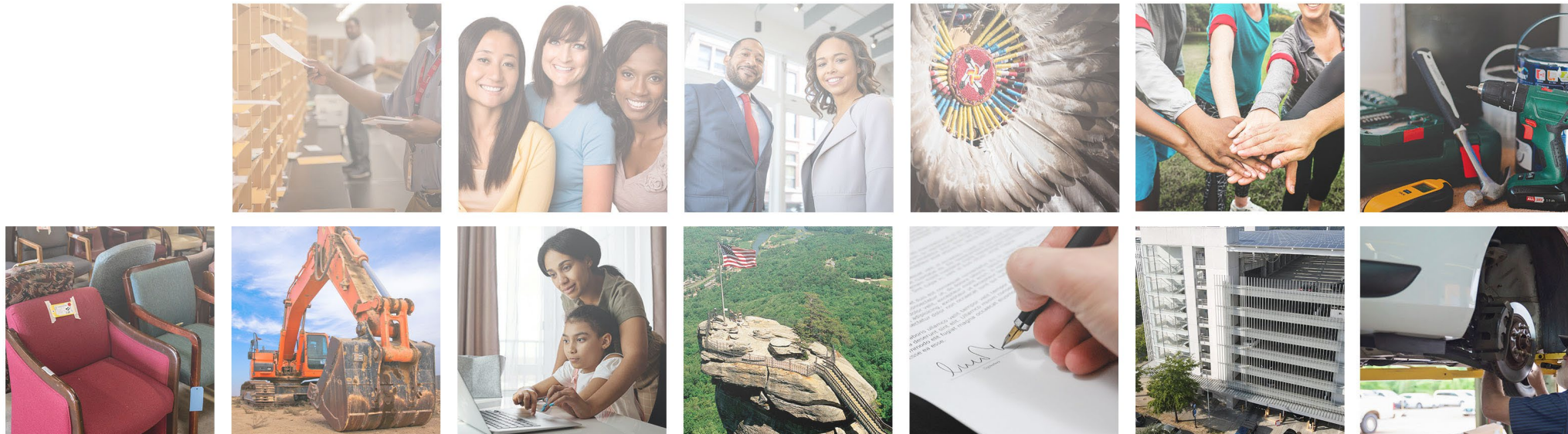


# How to Create a Trade-In Entry in AssetWorks



# 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 interface. 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', 'Transactions', 'Surplus', and 'Create'. The 'Surplus' menu item is expanded, showing a sub-menu with 'Surplus' and 'Create'. A red arrow points to the 'Create' option. On the right, the 'Adhoc Search Surplus' form is visible, containing a 'Creation Start Date' field with the value '04/01/2023', a 'Submit' button, a search input field, and a filter section with a checked checkbox and a green filter icon labeled 'Received D'.

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

The screenshot displays the NC DOA Department of Administration web application interface. On the left is a navigation menu with the following 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, Send to Surplus, Trade-In (highlighted with a red arrow), and Trash (worthless).

**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**.

**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**




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**

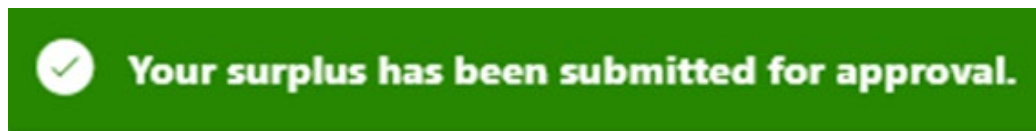
Edit Submit For Approval Pickup Labels

▼ 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

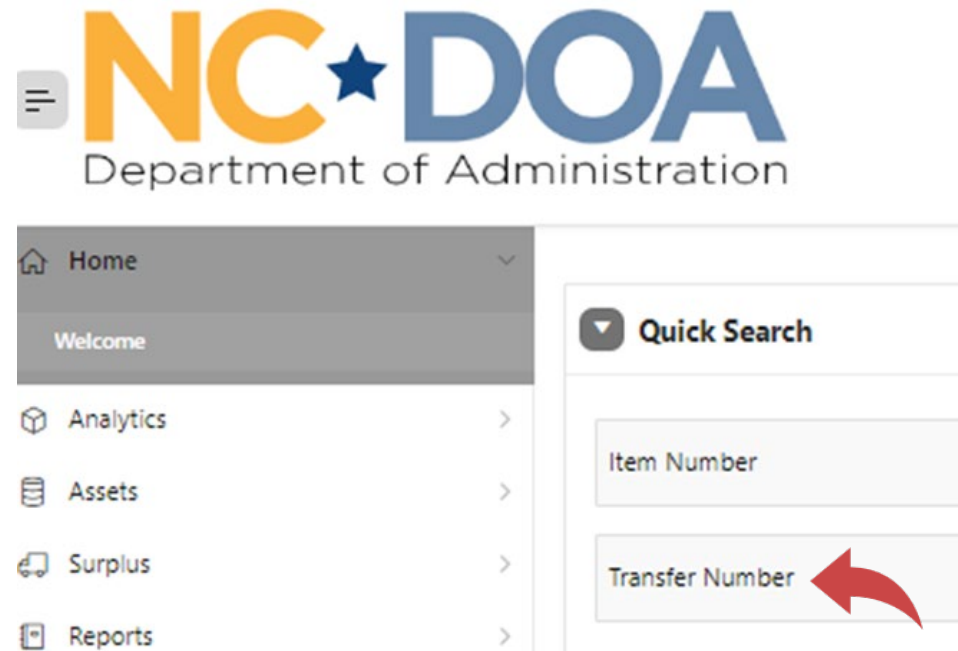
This is your confirmation that it was successfully submitted.



## 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 interface. At the top, the logo features 'NC' in orange, a blue star, and 'DOA' in blue, with 'Department of Administration' written below. A navigation sidebar on the left contains the following items: Home, Analytics, Assets, Surplus (highlighted with a red arrow), Surplus, and Create. The main content area on the right is titled 'Adhoc Search Surplus Transfers' and includes a search form with a 'Creation Start Date' field containing '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-23-68495	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 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 the '[+]' button. 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 the table is a text input field labeled 'Reject Reason'. A red arrow points to this field. At the bottom of the interface, there 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!**

**Darla Brown**

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**919-814-5602**