

Agency User

Surplus Transfers and Assets

AssetWorks

How to Create a Surplus Transfer with Assets

In order to submit assets to the NC Division of State Surplus, you will need to begin a Surplus Transfer. Select the Surplus option in the left side menu of your screen (has a truck icon). This will show the Create option in the Surplus drop down. Click on Create. You can now begin your Surplus Transfer.

Surplus Transfers are used when submitting any inventory (Asset) for Disposal, Recycling, or Surplus intended for Warehouse Sales, Online Auction Sales, or Sales between Agencies.



The screenshot displays the NC DOA Department of Administration web application interface. On the left, a navigation menu includes 'Home', 'Assets', 'Surplus', 'Surplus', and 'Reports'. The 'Surplus' menu item is expanded, showing a dropdown with 'Create' selected. A blue arrow points to the 'Create' option. The main content area is titled 'Create Surplus Transfer' and contains the following fields:

- Surplus Method * (dropdown menu)
- From Agency * (text field with 'ASHEVILLE REGIONAL AIRPORT' entered)
- From Division * (text field)
- Budget Code (text field)
- Recycling Contractor (text field)
- Notes/Comments (text field)
- Property Location -- (text field)
- Building (text field)

Creating a Surplus Transfer

Create the Surplus Transfer

Create Surplus Transfer

Surplus Method *

From Agency *

From Division *

Budget Code

Recycling Contractor

Notes/Comments

-- Property Location --

Building

Room

Address 1

Address 2

City

State

Zip

County

Contact Name

Contact Phone

Contact Email

Location Notes

Terms and Conditions

Hazardous materials:

Per 01 NCAC 43A.0202, Compressed gases, flammable, nuclear, chemical, biological, radioactive and other hazardous materials must be rendered and declared safe by the owning agency and a statement to this effect included in the item description when a disposal or sale of the item is requested. All laws and regulations must be followed and proper disposal documentation recorded with the regulatory federal, State and/or local agencies. All pertinent information related to regulatory requirements must be included in the item description. The owning agency must ensure all laws and regulations are followed in the transport and sale of the item. If a potential buyer is required to register with any regulatory agencies prior to taking possession of the equipment, the selling agency shall include all requirements in the description of the item and review and approve documentation presented by the successful buyer within 48 hours.

Sensitive Data:

Per 01 NCAC 43A.0201, The owning agency shall clear and destroy all data from Surplus items prior to disposal.

☐ I have read and agree to the above terms and conditions.

Create

- To begin, enter the **Surplus Method** from the dropdown menu. (This field is required.) See the end of this document for tips on each method.
- Select **From Agency** and the **From Division** —the name of the Agency and Division that will be transferring to surplus. If you don't know the official Agency or Division name, click the list option to the left of the field and choose from the dropdown menu. (These fields are required.)
- Enter any **Property Location information** you would like to provide.
- Other fields may be conditionally required based on the Surplus Method you selected. For example, if you Select the **Surplus Method** of "Recycle" then the **Recycling Contractor** field is required.
- When complete, read and check the "I have read and agree to the above terms and conditions" checkbox, then click the **Create** button.
- Please note;** When you select the Surplus Method of "Sell on Site" you will be required to enter a contact name, phone number and email. This information is what will show in your auction listing on the public auction site. Public customers will need to be able to contact this person with questions about your items and to set up any required appointments to view items while on bid and also to schedule pick up appointments for awarded items.

This creates your Surplus Transfer Header. The system will then take you to a new screen, the **Surplus Detail** screen as shown below, where you can create the assets that you want to add to the surplus transfer.

Add Assets to the Surplus Transfer

In the Surplus Detail screen, you can add assets to your Surplus Transfer by creating the asset. Click the Create New Asset button and fill out the information for the new item in the insert surplus asset screen. Click Save and Done for one asset, Save and Same for similar assets, or Save and New for different assets. To add photos or files, click on the Save and Add Images button. The Item Number is assigned automatically for each asset [AUTO-ASSIGN].

- If you select a **Vehicle** from the **Category** dropdown menu for an asset, then you are also required to complete the **Make, Model, Year, VIN, Title** fields, **Total Loss** fields, **Odometer** fields and the **DMV Fees** for that asset.
- If you select a **Marine Equipment** from the **Category** dropdown menu for an asset, then you are also required to complete the **Make, Model, Year, Hull Number, Length**, and the **With Trailer** for that asset.
- If you select a **Weapon** from the **Category** dropdown menu for an asset, then you are also required to complete the **Serial Number, Make, and Model** for that asset.
- **When submitting items for "Sell on Site"**, the Quantity of your Asset should always be "1" if you are selling that asset as a Lot of items. Ex: Lot of (20) Purple Chairs would go in the description

area of the asset and your quantity would remain “1” since the chairs are to be listed to all sell to a single bidder.

- **When submitting items for “Send to Surplus”**, you must create a new Surplus Asset for each item that you are sending. Ex: You are sending three red office chairs, but they are all slightly different, one may have wheels, one may not have arms and one may be a darker shade. Each chair must be submitted individually. You will have three separate Item Numbers and your quantity on each would be “1”. If you have 10 chairs that are the same, you may use the Save and Same option to enter them 10 times with the same information and that will create the 10 separate Item Numbers.

Insert Surplus Asset

Item Number * [AUTO-ASSIGN] Quantity * 1

NC Asset Number UoM * EA - EACH

Class * Min Price

Description *

Additional Description

Agency * 00003 - ASHEVILLE REGIONAL AIRPORT

Division * ASHEVILLE REGIONAL AIRPORT

-- Summary --

Serial Number

Make

Model

Color

Year

-- Marine Equipment --

Hull

Length

With Trailer

-- Original Acquisition --

Date * 11/09/2022

Cost * 0

Method * SELL ON-SITE

-- Notes --

Notes 1

Notes 2

Notes 3

-- Vehicles --

VIN

Odometer or Hours

Odometer or Hours UoM

Title Number

Cylinders

A/C NO

4WD NO

Extended Cab NO

Crew Cab NO

Dual Rear Wheels NO

Handicapped Lift NO

Manual Transmission NO

Total Loss NO

Total Loss Value

DMV Fees

Back Save & Same Save & New Save & Done Save & Add Images

Recycling Submissions

- You will need to include the Recycling Vendor in your Submission information.
- You will need to include a photo/scan of your recycling ticket or receipt.
- County will need to be included.
- In extended description please include location of pickup, vendor #, ticket #, PO # from Recycler, date of pickup or drop off and weight/number of items recycled, if known

Add an Image

To attach an image, click on the **Docs/Images** link next to each asset in the Asset section. The link is the number of images currently attached to the asset. As you can see below, the **Docs/Images** are listed as “1,” which means the asset has one file attached.

- Vehicles assets require at least 6 images. (Front, back, and sides of the outside of the vehicle, the inside of the vehicle opened from driver's side door, the odometer, the dashboard VIN, and the last 6 digits of the VIN written on the outside of the vehicle OR typed on a piece of paper and taped inside the windshield)
- Non-Vehicle assets require at least 1 image

Agency Labels Sent

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-22-55798-001-NT	1234	Lot of (2) Refrigerators	\$10.00	1	-	-	-	In Transfer	-	-	-	1

Download

row(s) 1 - 1 of 1

Back Remove Asset Print Labels (PDF) Print Detail



Click the **Docs/Images** link, and this brings up the **Attachment Insert** dialog box. Click **Choose File** to select an image from your computer or you can drag and drop the file in the window. If this is the only attachment you wish to add, click **Save & Done**. If you have additional images you'd like to add, click **Save & New**; this will save your image and refresh the screen so you can add another image.

If your image appears sideways, please use the Rotate Left or Rotate Right button to correct the image. Images will appear on the auction site exactly how you submit them. (For Sell on Site)

The number on the **Docs/Images** link will change, based on the number of images added for each asset.

▼ S-22-55798-001-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

▼ Documents & Images for S-22-55798-001-NT



Public - Refrigerator.jpg

Rotate Left

Rotate Right

Once all assets have been added or removed, click on the **Submit For Approval** button. This sends the transfer into the Approval process. These assets now must be approved by a user with the proper approval permissions.

This will also set the **Submit for Approval Date** and **Submit for Approval User** and lock down the surplus transaction. No new assets can be added to or removed from a transaction while it's in the Approval process.

If your transfer request is not approved, the original request will be void and you will need to create a new surplus transfer.



Edit
Submit For Approval
Pickup Labels

Pickup Contact Name

Pickup Contact Phone

Pickup Contact Email

Pickup/Delivery Method

Pickup Location Notes

Agency Labels Sent

▼ **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-22-55798-001-NT	1234	Lot of (2) Refrigerators	\$10.00	1	-	-	-	In Transfer	-	-	-	1

[Download](#)

Related Content

- There are conditionally required fields based on the surplus method and Agency selected. The system will alert you to the required fields.

TIPS FOR SUBMITTING ASSETS FOR SELL ON SITE

- DO NOT USE ALL CAPS IN DESCRIPTIONS.
- USE ACCURATE DESCRIPTIONS AND DO NOT TRY TO HIDE KNOWN DEFICIENCIES ABOUT THE ITEM/ITEMS.
- THERE WILL **NOT** BE A FINAL CONFIRMATION BEFORE THE ITEM IS LISTED FOR PUBLIC AUCTION. YOU MUST SEND IN THE ASSET WITH ALL INFORMATION COMPLETE AND IT WILL LIST ON PUBLIC AUCTION ON A SCHEDULE AS DETERMINED BY THE NC DIVISION OF SURPLUS PROPERTY.
- IF YOU DO NOT SET A MIN BID ON THE SUBMISSION, IT WILL DEFAULT TO \$1.00.
- LIMIT SUBMISSIONS TO 50 ITEMS PER SURPLUS TRANSFER. IF YOU HAVE ADDITIONAL ITEMS, YOU WILL NEED TO START AN ADDITIONAL SUBMISSION.
- INCLUDE FIXED ASSET NUMBERS FOR DISPOSITION AUDIT TRAIL.
- QUANTITY SHOULD ALWAYS BE "1" IN THE QUANTITY FIELD. USE THE ADDITIONAL DESCRIPTION BOX FOR SPECIFICS IF THERE IS A "LOT" OF MULTIPLE ITEMS. EX: Lot of (20) Red Folding Chairs.
- USE ITEM SPECIFIC PHOTOS WITHOUT BACKGROUND CLUTTER. "STOCK" PHOTOS CAN NOT BE USED, PHOTO MUST BE OF ACTUAL ITEM BEING LISTED AND ONLY THAT ITEM.
- IF THE ITEM IS "OFF-SITE" INCLUDE A PHYSICAL LOCATION IN THE ADDITIONAL DESCRIPTION BOX. WE MUST HAVE A LOCATION IN THE AUCTION LISTING FOR PUBLIC CUSTOMERS TO VIEW AND PICK-UP AWARDED ITEMS.
- THE CONTACT FOR THE ITEM MUST BE AVAILABLE TO ANSWER QUESTIONS ON THE ITEMS AND TO SCHEDULE VIEWING AND PICK UP FOR AWARDED ITEMS.
- CONFIRM THAT ALL INFORMATION IS ACCURATE. ONCE THE ASSET IS SUBMITTED, THERE WILL NOT BE A FINAL CONFIRMATION BEFORE THE ITEM IS LISTED FOR BID.
- BOATS AND TRAILERS MUST BE SUBMITTED AS TWO SEPARATE ASSETS. PLEASE INDICATE IN THE ADDITIONAL DESCRIPTION BOX IF THE TWO ITEMS ARE TO BE COMBINED IN A LOT AND SOLD TOGETHER (ENTER BOAT FIRST AND THEN WHEN ENTERING TRAILER, MAKE A NOTATION IN THE ADDITIONAL DESCRIPTION THAT THIS ASSET IS TO BE SOLD IN A LOT AND INCLUDE THE ITEM NUMBER OF THE BOAT ALREADY ENTERED).
- WHEN SUBMITTING A VEHICLE AS SELL ON SITE, YOU WILL NEED TO INCLUDE 6 SPECIFIC PHOTOS. THE PHOTOS MUST INCLUDE
 - 3 PHOTOS OF THE OUTSIDE OF THE VEHICLE SHOWING THE FRONT, BACK AND SIDES. 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.
 - THE INSIDE OF THE VEHICLE (USUALLY FROM THE OPEN DRIVER'S SIDE DOOR).
 - THE ODOMETER, SHOWING MILEAGE.
 - THE DASHBOARD VIN.

- ALL TITLES FOR VEHICLES WILL NEED TO BE RECEIVED BY OUR OFFICE BEFORE THE ASSET CAN BE LISTED FOR AUCTION. GEM CARS ARE CONSIDERED VEHICLES. **THIS INCLUDES TITLES ON ALL TRAILERS AND A VESSEL BILL OF SALE ON ALL BOATS.** IF YOUR VEHICLE DOES NOT HAVE A TITLE, PLEASE REACH OUT TO THE DMV TO OBTAIN ONE BEFORE SUBMITTING TO SURPLUS. FOR BOATS, YOU MAY FIND A BILL OF SALE AT [Bill of Sale Form \(ncwildlife.org\)www.ncwildlife.org/Portals/0/Boating/document](http://www.ncwildlife.org/Portals/0/Boating/document)

TIPS FOR SUBMITTING ASSETS FOR SEND TO SURPLUS

- DO NOT USE ALL CAPS IN DESCRIPTIONS.
- YOU DO NOT NEED TO INCLUDE PHOTOS.
- EVERY ITEM WILL NEED TO BE SUBMITTED AS AN INDIVIDUAL ASSET (qty 1).
- FOR VEHICLES-USE YOUR OWN LOCATION EVEN WHEN THE SURPLUS METHOD IS “SEND TO SURPLUS”.
- BOATS AND TRAILERS MUST BE SUBMITTED AS TWO SEPARATE ASSETS. PLEASE INDICATE IN THE ADDITIONAL DESCRIPTION BOX IF THE TWO ITEMS ARE TO BE COMBINED IN A LOT AND SOLD TOGETHER (ENTER BOAT FIRST AND THEN WHEN ENTERING TRAILER, MAKE A NOTATION IN THE ADDITIONAL DESCRIPTION THAT THIS ASSET IS TO BE SOLD IN A LOT AND INCLUDE THE ITEM NUMBER OF THE BOAT ALREADY ENTERED).
- ALL TITLES FOR VEHICLES WILL NEED TO BE RECEIVED BY OUR OFFICE BEFORE THE ASSET CAN BE LISTED FOR AUCTION. **THIS INCLUDES TITLES ON ALL TRAILERS AND A VESSEL BILL OF SALE ON ALL BOATS.** IF YOUR VEHICLE DOES NOT HAVE A TITLE, PLEASE REACH OUT TO THE DMV TO OBTAIN ONE BEFORE SUBMITTING TO SURPLUS. FOR BOATS, YOU MAY FIND A BILL OF SALE AT [Bill of Sale Form \(ncwildlife.org\)www.ncwildlife.org/Portals/0/Boating/document](http://www.ncwildlife.org/Portals/0/Boating/document)
- INCLUDE FIXED ASSET NUMBERS FOR DISPOSITION AUDIT TRAIL.
- ALL COMPUTERS SHOULD BE ON ONE SUBMISSION, VEHICLES SHOULD BE ON THEIR OWN SUBMISSION AND WAREHOUSE ITEMS SUCH AS FURNITURE SHOULD BE ON THEIR OWN SUBMISSION.
- LIMIT SUBMISSIONS TO 50 ITEMS. IF YOU HAVE MORE THAN 50 ITEMS, START A NEW SURPLUS SUBMISSION FOR THE REMAINING ITEMS.
- ONLY ENTER ITEMS THAT YOU ARE ACTUALLY BRINGING TO SURPLUS TOGETHER IN THE SAME TRIP.
- MAKE SURE TO INCLUDE YOUR MAIL SERVICE CARRIER NUMBER IN THE NOTES/COMMENTS SECTION OF YOUR SUBMISSION SO THAT LABELS CAN BE MAILED TO YOU OR “PICKUP” IF YOU ARE COMING TO OUR LOCATION TO PICKUP LABELS.
- ALL ITEMS EXCEPT VEHICLES, BOATS AND TRAILERS MUST HAVE A LABEL ATTACHED PRIOR TO BRINGING TO OUR LOCATION.

TIPS FOR SUBMITTING ASSETS FOR RECYCLING

- YOU MUST LIST A RECYCLING CONTRACTOR.
- PLEASE INCLUDE A PHOTO/SCAN OF THE RECYCLING TICKET IN YOUR SUBMISSION.
- THE COUNTY THAT THE RECYCLING WAS PICKED UP IN, SHOULD BE NOTED.
- IF YOU HAVE THE VENDOR #, TICKET # OR PO# FROM THE RECYCLER, DATE OF THE PICKUP OR DROP OFF AND WEIGHT/NUMBER OF ITEMS RECYCLED IF KNOWN. PLEASE ADD THAT INFORMATION IN THE EXTENDED DESCRIPTION.
- INCLUDE FIXED ASSET NUMBERS FOR DISPOSITION AUDIT TRAIL.
- ANY RECYCLING THAT IS BEING BROUGHT TO OUR LOCATION NEEDS TO BE ENTERED AS "SEND TO SURPLUS"
- ANY RECYCLING FOR WHICH YOU WILL NOT BE PAID PROCEEDS FOR SHOULD BE ENTERED AS "TRASH" WITH THE RECYCLE INFORMATION LISTED IN THE EXTENDED DESCRIPTION

TIPS FOR SUBMITTING ASSETS FOR TRADE-IN

- A CURRENT (NOT EXPIRED) QUOTE MUST BE INCLUDED THAT SHOWS THE EXACT ITEM(S) BEING TRADED IN, THE PRICE BEFORE THE TRADE IN CREDIT, THE DEDUCTION OF THE TRADE IN CREDIT AND THE FINAL PRICE AFTER THE TRADE IN CREDIT. THE QUOTE SHOULD BE DOWNLOADED IN THE DOCUMENTS SECTION OF THE SURPLUS SUBMISSION.
- A JUSTIFICATION FOR TRADE-IN VERSUS SELLING THE ITEM TO THE PUBLIC SHOULD BE INCLUDED IN THE EXTENDED DESCRIPTION.
- ORIGINAL ACQUISITION PRICE AND DATE SHOULD BE FILLED IN. IF EXACT DATE AND AMOUNT ARE NOT KNOWN, A PROXIMATE WILL BE ACCEPTABLE.
- INCLUDE FIXED ASSET NUMBERS FOR DISPOSITION AUDIT TRAIL.

TIPS FOR SUBMITTING ASSETS FOR "TRASH" DISPOSAL

- A PHOTO IS REQUIRED. YOU MAY GROUP LIKE ITEMS TOGETHER. PHOTOS SHOULD SHOW DAMAGE OR POOR CONDITION OF ITEM(S).
- A JUSTIFICATION FOR DISPOSAL IS REQUIRED. ONLY ITEMS WITH NO VALUE AS EITHER SCRAP OR RETAIL WILL BE APPROVED. IS THE ITEM BROKEN? IN POOR CONDITION? THIS SHOULD BE INCLUDED IN THE EXTENDED DESCRIPTION.
- ORIGINAL ACQUISITION PRICE AND DATE SHOULD BE FILLED IN. IF EXACT DATE AND AMOUNT ARE NOT KNOWN, A PROXIMATE WILL BE ACCEPTABLE.
- IF THE ITEM HAS VALUE AS SCRAP FOR RECYCLING WITH FUNDS RETURNED, IT WILL NEED TO BE SUBMITTED AS RECYCLING, NOT DISPOSAL.

- **INCLUDE FIXED ASSET NUMBERS FOR DISPOSITION AUDIT TRAIL.**

TIPS FOR SUBMITTING ASSETS FOR AGENCY SALE

- **AN AGENCY SALE CAN ONLY BE APPROVED BETWEEN STATE AGENCIES, LOCAL MUNICIPALITIES AND APPROVED NON-PROFIT ORGANIZATIONS. IF YOU ARE UNCERTAIN, PLEASE CONTACT THE DIVISION OF SURPLUS BEFORE BEGINNING A NEGOTIATION.**
- **DOCUMENTATION BETWEEN THE TWO AGENCIES SHOWING EXACTLY WHAT IS BEING SOLD AND FOR HOW MUCH, WITH AN AGREEMENT TO PURCHASE BY THE PURCHASING AGENCY, MUST BE INCLUDED IN THE SUBMISSION. THIS MAY BE IN THE FORM OF A SIGNED DOCUMENT OR AN EMAIL CHAIN BETWEEN THE TWO REPRESENTATIVES, BOTH USING OFFICIAL EMAIL ADDRESSES.**
- **A PHOTO IS REQUIRED.**
- **THE AGREED UPON PRICE FOR THE SALE MUST BE FAIR MARKET VALUE AS DETERMINED BY THE SELLING AGENCY AND AGREED UPON BY THE PURCHASING AGENCY.**
- **CONTACT INFORMATION FOR THE PURCHASING AGENCY MUST BE INCLUDED (NAME, PHONE NUMBER, EMAIL, PHYSICAL ADDRESS).**
- **IF THE PURCHASING AGENCY IS TAX EXEMPT, WE WILL NEED TO HAVE AN E-595E FORM ON FILE FOR THEM OR TAX WILL BE CHARGED.**
- **IF A VEHICLE IS BEING SOLD TO ANOTHER AGENCY/MUNICIPALITY/APPROVED NON-PROFIT, WE WILL NEED THE TITLE ON SITE IN OUR RALEIGH OFFICE BEFORE THE SALE CAN BE COMPLETED. WE WILL ALSO NEED A TITLE INFORMATION SHEET FILLED OUT BY THE PURCHASING AGENCY SO THAT THE TITLE IS COMPLETED CORRECTLY AFTER THE SALE.**
- **ORIGINAL ACQUISITION PRICE AND DATE SHOULD BE FILLED IN. IF EXACT DATE AND AMOUNT ARE NOT KNOWN, A PROXIMATE WILL BE ACCEPTABLE.**
- **INCLUDE FIXED ASSET NUMBERS FOR DISPOSITION AUDIT TRAIL.**