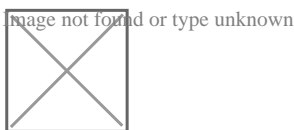


## **CU Marketplace How-to: Creating Subcontract SPOs with F&A Split** <sup>[1]</sup>

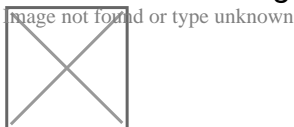
For Subcontract SPOs that are greater than \$25,000 and need to account for Facilities & Administrative costs (F&A), the requisition needs to be set up with 2 PO lines, with one account code pointing to line 1 and another pointing to line 2. This guide shows how to create that 2 line requisition.

**Note:** This is **not** to be confused with 2 accounting code distribution lines on one PO line - this method does not work for this type of accounting as it will ensure that every purchase invoiced against the SPO will be paid for using funds from each account code, whereas the two line method will ensure that first the \$25K account code is used up, and then the remaining funds account code will be used.

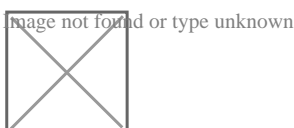
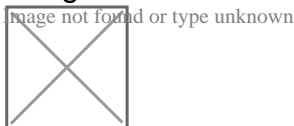
From Marketplace, click on one of the commodity dashboards at the top of the page (any commodity will work):



Scroll down to the **Showcases** section and select **SPO - Sponsored Project Subcontract** from *CU Purchasing & Payment Forms*:



The form will open, which creates the first line (first \$25K) of the requisition. Enter the **Supplier** under **Payment Information** or click the search icon. Select the appropriate supplier from the list of results, ensuring to select the location the purchase order should be distributed from using the **+** icon:



Can't find the supplier/information needed?

1) If the supplier to purchase from is available in Marketplace but the specific address is not listed in the search results, email [cusupplier@cu.edu](mailto:cusupplier@cu.edu) <sup>[2]</sup>, requesting that they add a fulfillment

address to the supplier - an email address or fax number will be needed

2) If the supplier is not available at all, they will need to be requested using Requesting a Purchase Order Supplier for the CU Marketplace [3]

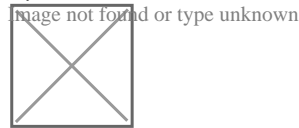
Once the supplier is verified, enter the required information under **Standing Order Details**:

1) Enter the **SPO Description**.

2) The **Unit Price** defaults to "1.00" and cannot be changed.

3) Enter the amount for the first line in **SPO Encumbrance** - since this PO will be over \$25K subject to F&A and this is the first line, this total should be \$25K.

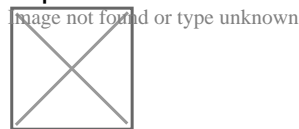
4) Select a **Commodity Code**.



Under **Standing Order Term**:

1) Enter the **Begin Date** of the SPO. This is a date in the future when work should begin.

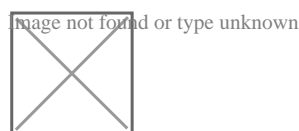
2) Enter the **End Date** of the SPO. This is a date in the future when the last invoice is expected.



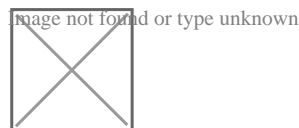
Under **Additional SPO Details**:

1) Enter the **Subcontract Grand Total** amount. This is the full amount expected to pay over the course of this SPO.

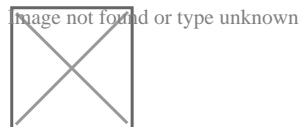
2) If renewing an existing Subcontract SPO, enter the **Standing Order PO # being replaced**.



In the top right of the form, click **Add and Go to Cart**:

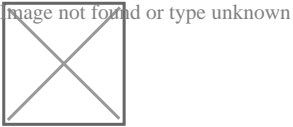


Once returned to the cart, click again on the form:

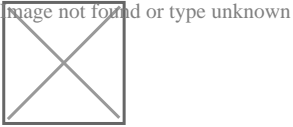


Make changes to this form such that it will be the second line of the requisition (for example - if the requisition will be for \$100,000, since the first line was \$25K the second line should be \$75K - the only change that should be necessary is the **Amount**). Be careful to not press the **Save** button during this process, since this will change the first line. Once the changes are

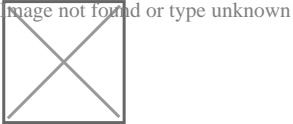
made, click the drop down next to the **Save** button (on the top right-hand corner) and click **Add and Go to Cart:**



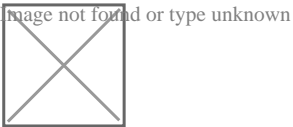
In the cart now, there should be two lines for the requisition:



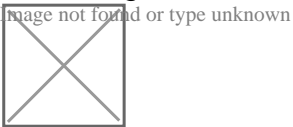
In the top right of the cart, click the **Add Speedtype/Shipping/etc.** button:



This process is more explicitly detailed in [CU Marketplace: Adding Details to Shopping Carts](#) <sup>[4]</sup>, but specifically related to F&A Account Code splits, first change the Accounting Codes for the first line. Ensure the account code in this section is the account code for the first \$25K:



Then change the account code on the second line, which should be the account code for the remaining funds of the Subcontract:



The requisition can be finalized from here as necessary.

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**Source URL:** <https://www.cu.edu/psc/cu-marketplace-how-creating-subcontract-spos-fa-split>

#### Links

[1] <https://www.cu.edu/psc/cu-marketplace-how-creating-subcontract-spos-fa-split>

[2] <mailto:cusupplier@cu.edu> [3] <https://www.cu.edu/psc/training/cumarketplace/cu-supplier-submit-supplier-request>

[4] <https://www.cu.edu/psc/cu-marketplace-how-adding-details-shopping-carts-such-speedtypes-and-shipping>