

## What is Tier 2 Diversity Reporting?

Tier 2 Diversity reporting is a process where suppliers can share their diversity spend with their customers. This allows organizations to recognize the effect of their spend with non diverse suppliers who engage with diverse suppliers, as well as their direct spend with diverse suppliers.

When selecting suppliers or putting a strategic supplier program in place, large organizations place significant importance on doing business with companies that promote equality, innovation, and sustainability.

TealBook's support for Tier 2 reporting allows all companies, even those without diversity programs, to help their customers meet their diversity spending goals. Companies simply upload spend data once per quarter using TealBook's secure application and allocate a portion of the discovered diverse spend to their customer. TealBook's technology identifies the diverse suppliers in the provided spend and generates free, summary level diversity reporting for the participating company.

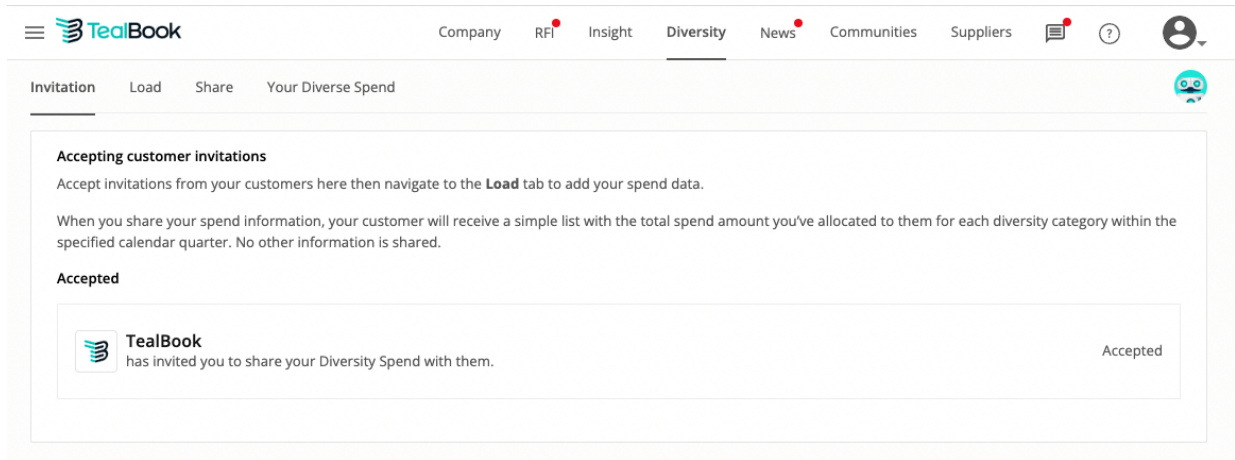
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## Supplier Upload Process

### Getting Started: Accept Invitation

After receiving your invitation email and clicking on your unique access link, you will be taken to the TealBook platform. Under the **Diversity** tab, you will be able to see all of the buyers who invited your organization to participate in Tier 2 Diversity Reporting. Click **Accept** to start your upload process.



*\*For demo purposes, we are using our company profile\**

## How to Upload Spend

You can upload your spend in several different ways, either by uploading your full master spend, only your direct spend with the customer, your direct or indirect aggregate spend, or a combination of both direct and aggregate spend. We will cover all of the different methods below.

### Method 1: Full Spend Upload

*\*This method applies if you are able to provide your organization's full supplier spend for the quarter regardless if the spend is diverse or non-diverse.*

- Obtain your full Supplier Spend Master for the quarter. You can typically obtain this information from your **finance or procurement department**. You do not need to know which suppliers are diverse, please use all supplier spend information.
- Navigate to the **Load** tab and click the **+ Add your supplier spend information** or the **Get started** button.



- From the **Buyer** dropdown list, select the customer you would like to add spend data for and select the **Year** and **Quarter** that you would like to report on.

◀ Back to file history

### Add your supplier spend information

Complete the fields below to get started.

Choose **File** data type to upload a detailed breakdown of your spend for the selected quarter. **Aggregate** data type allows you to manually enter your total direct or indirect spend amount for each diversity category for the selected quarter.

For more information, see [Loading data for Tier 2 diversity reporting](#).

Buyer	Year	Quarter	Data type	Spend type
TealBook	2018	Q1	Select data type	Select spend type

Next

- From the **Data type** dropdown list, choose **File** as the data type and select **Full Spend** as the spend type. Click **Next**.

◀ Back to file history

### Add your supplier spend information

Complete the fields below to get started.

Choose **File** data type to upload a detailed breakdown of your spend for the selected quarter. **Aggregate** data type allows you to manually enter your total direct or indirect spend amount for each diversity category for the selected quarter.

For more information, see [Loading data for Tier 2 diversity reporting](#).

Buyer	Year	Quarter	Data type	Spend type
TealBook	2018	Q1	File	Full spend

Next


- After clicking **Next**, Click on the **Download Spend Template** button and open the Tier 2 Spend Template file.

#### Upload your spend file

- Download and open the load file template.
- Review the instructions in the **Instructions** tab, then populate your spend data under the appropriate columns in the **Details** tab.
- Save and drop the completed template into the uploader.
- Click **Upload file**.

Download spend template

#### Select a quarter and upload your file



Choose a file or drag it here.

Maximum file size is 32 MB.  
Supported files: .csv, .xlsx, .xls

Upload File


- Populate the Spend Template in the **Details Tab** with the data from your Supplier Spend Master. You will find the list of **mandatory fields** to enter on the **Instructions Tab**.

requestorsupplierid	name	domain	email	phone	address	amount	spenddate	category	spendgroup	spendcountry
100181	testname1	testdomain.com	contact@testdomain.co	9876543210	1234 Main St., Woodbury	1000.2	2020/01/14	technology	Direct	US

\*Mandatory Fields Highlighted.

- Please do not make any changes to the headers or sheet names, and delete the sample line before you get started.
- Once you have finished entering your data on the template, **save the file in .csv, .xlsx, or .xls** format.
- Upload your completed load file by either dropping it into the upload box or clicking the cloud. You can then browse for your load file and press the **Upload File** button.

Select a quarter and upload your file



Choose a file or drag it here.

Maximum file size is 32 MB.  
Supported files: .csv, .xlsx, .xls

Upload File

- If the file upload is unsuccessful, a popup window will notify you with an explanation of what caused the error. It will also provide you with a recommended solution so you can successfully re-upload the file.

**We could not process the file you uploaded** ×

Column format error:

- The date entered in multiple rows are not in the selected quarter.

Please check mandatory fields and/or check column formatting and try again.






Close

- When your spend file is successfully uploaded, it will appear in the **Upload history table** within the Load tab and its status will be changed to **Processing**. Our system will match the suppliers in your loaded file with their supplier profiles in TealBook. This process can take between 5 to 60 minutes.
- When the file's status changes to **Complete**, click **View** to review your supplier mapping and make any required edits. If you encounter any Not Found suppliers within your upload, you can remap them using the steps below.

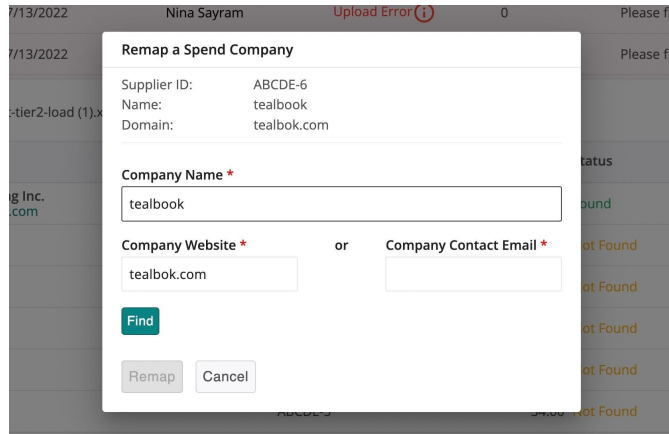
2-Q3	2022-Q2	2022-Q1	2021-Q4	2021-Q3	2021-Q2	2021-Q1	2020-Q3	2020-Q2	2020-Q1	2019-Q2	2019-Q1	2018-Q2	2018-Q1
Buyer(s)	Filename	Spend Type	Upload Date	User	# Of Rows	Status							
TealBook	2018 Q1 - Testing.xlsx	Full spend	09/07/2022	Ercie Hamilton	3	Published	View	Publish					

## Mapping Process


- Once you click **View**, you will be able to see all of your uploaded suppliers and see if they have been successfully mapped to their profiles in TealBook.
- If the supplier's mapping status is **Not Found**, click on the **Pencil** icon beside their name to manually map them.

Name	Supplier ID	Amount	Status
  Worcester Eisenbrandt, Inc. weirestoration.com, weilconstruction.com	WEI	699,948.55	Found
 Fire Solutions, Inc	FSI	247,473.38	Not Found
  DMA Floors dmafloors.com	DMA	217,849.26	Found

- In the pop-up window, enter either the company's website or the contact person's email address and click **Find**.



- Next, select the correct supplier and click **Remap**. If the correct supplier is not listed, click **None of the above** to try searching for the supplier again.
- Repeat this process until you are satisfied with your mapping.
- Navigate back to the **file history table** and click **Publish**.

TealBook	2018 Q1 - Testing.xlsx	Full spend	Today	Ercie Hamilton	3	Complete	<b>View</b>	<b>Publish</b>	
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- From here, the next step is to **share** an allocation of your diverse spend to your customer. Head over to **Share Tab** to enter your allocation.

## Share Allocation

After entering your spend data, your next step is to enter the Indirect Allocation Factor for the customer you are reporting for.

**Formula:**  $(\text{Sales to Customer for the Quarter} / \text{Total Company Sales for the Quarter}) \times 100 = \text{IAF\%}$

- You can enter or edit the Indirect Allocation Factor for each customer by navigating to the **Share** tab. Find the specific year and quarter for the customer you are looking to allocate your diverse spend to.
- Enter the percentage of spend that you would like to allocate to the customer in the box next to the % sign.

2018 - Q1 Diverse Spend		\$93,468.90
Indirect Spend ⓘ	\$93,468.90 × <input type="text" value="5"/>	% \$4,673.45
Direct Spend ⓘ	<input type="text" value="Add a diverse supplier"/>	
		Total Shared: \$4,673.45
		<input type="button" value="Preview"/> <input type="button" value="Share"/>

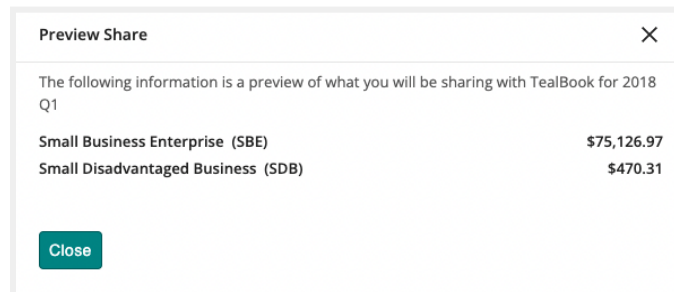
- If there are suppliers hired specifically to fulfill the contract with the customer you are uploading spend for, you are able allocate 100% of that spend by entering the supplier name in the **Direct Spend** field.

2018 - Q1 Diverse Spend		\$93,468.90
Indirect Spend ⓘ	\$93,468.90 × <input type="text" value="5"/>	% \$4,673.45
Direct Spend ⓘ	<input type="text" value="Simcon Company"/>	
		Total Shared: \$4,673.45
		<input type="button" value="Preview"/> <input type="button" value="Share"/>

- Enter **100%** for the direct spend suppliers only, and an indirect allocation percentage for the indirect spend.

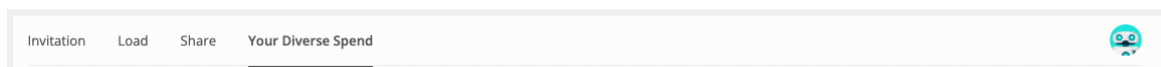
2018 - Q1 Diverse Spend		\$93,468.90
Indirect Spend ⓘ	\$18,812.24 × <input type="text" value="5"/>	% \$940.61
Direct Spend ⓘ	<input type="text" value="Add a diverse supplier"/>	
×	Simcon Company	\$74,656.66 × <input type="text" value="100"/> % \$74,656.66
		Total Shared: \$75,597.27
		<input type="button" value="Preview"/> <input type="button" value="Share"/>

- Privacy is extremely important to us. Before sharing your spend, you are able to view which information is being shared by clicking on the **Preview** button.

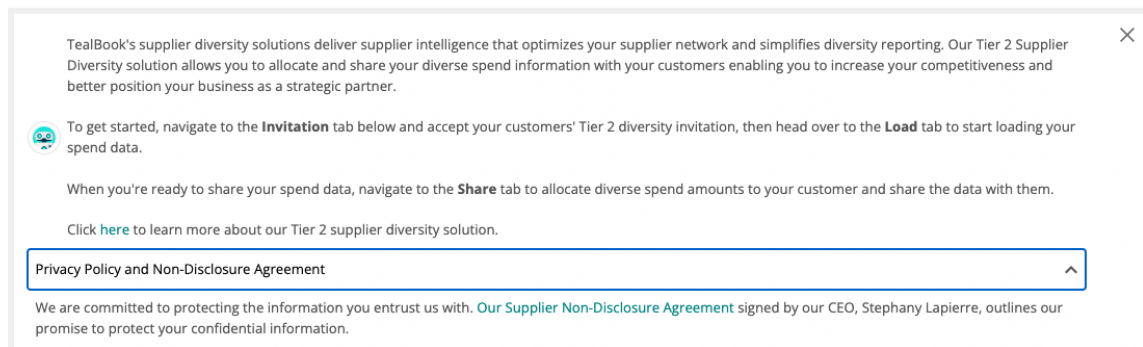


*\*We only share the total aggregate amount per diverse category that is allocated to your customer. Customers will not be able to see or access your supplier list and information, your total revenue, or your total diverse spend.*

- If you are in need of an NDA, you are able to download our one-sided NDA signed by our CEO Stephany Lappiere by clicking on the Robot icon in the top right corner of the page.



- Under the Privacy and Non-Disclosure Agreement section, click on the **Non-Disclosure Agreement** button to download.



- If a mutual NDA is needed, please send an email to [suppliersupport@tealbook.com](mailto:suppliersupport@tealbook.com).
- Finally, click **Share** and **Confirm** the accuracy of your upload to complete the process and to view your [Diversity Report](#).

### Confirmation

☒ Supplier reaffirms its compliance with the [Terms of Service](#), including the warranty of accuracy of all data provided.

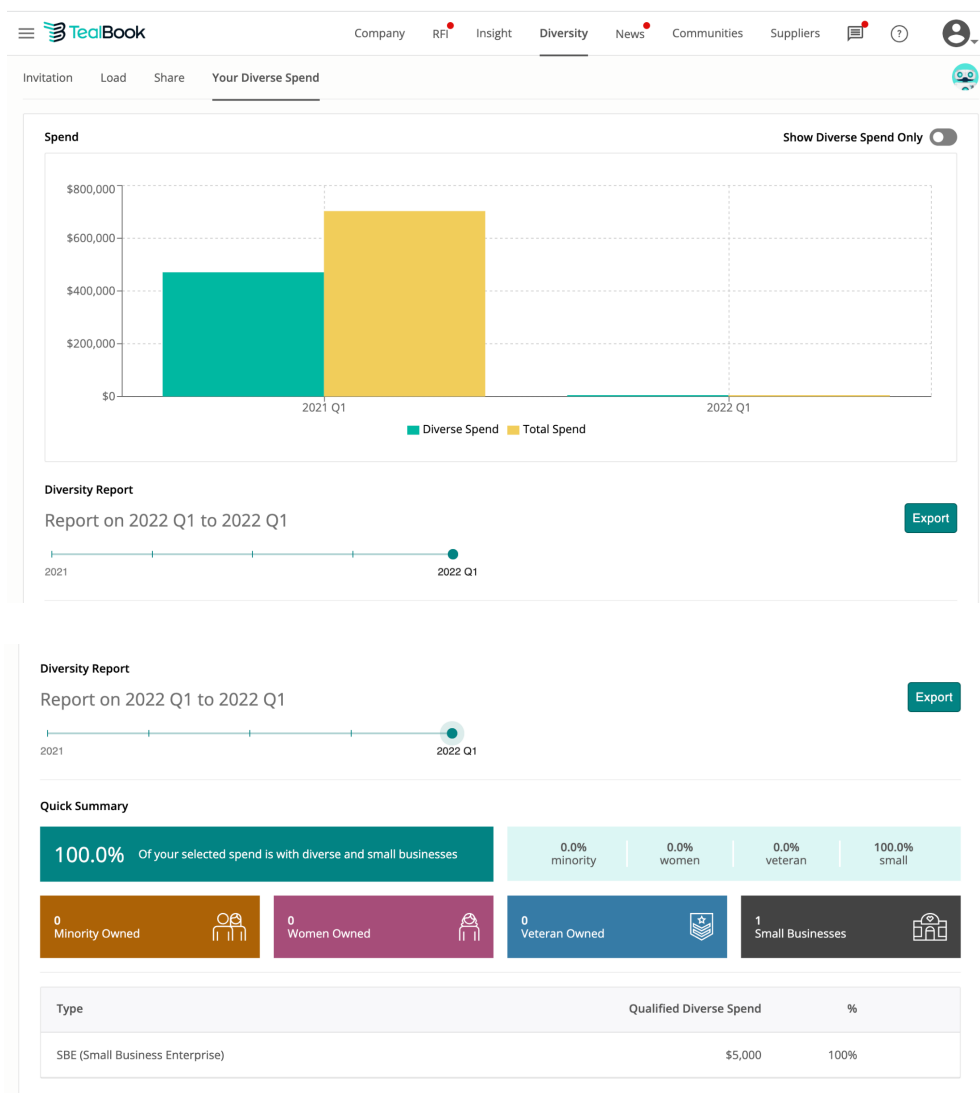


## Diversity Report

TealBook provides a free diversity report to any suppliers who participate in their customer's Tier 2 Program. Your free diversity report includes the following information:

- Breakdown of Total Spend vs. Diverse Spend
- Quick Summary
- Detailed Spend Breakdown by Diverse Category

To view your Diversity Report, navigate to the **Your Diversity Tab**.



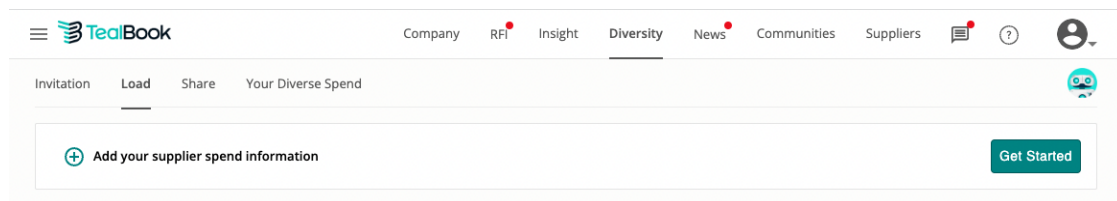


You are able to use the Diversity Report to easily keep track of your company's diverse spend compared to your total spend. If you see the value of TealBook and would like to know more about our Managed Tier 2 Program, please reach out to [suppliersupport@tealbook.com](mailto:suppliersupport@tealbook.com)

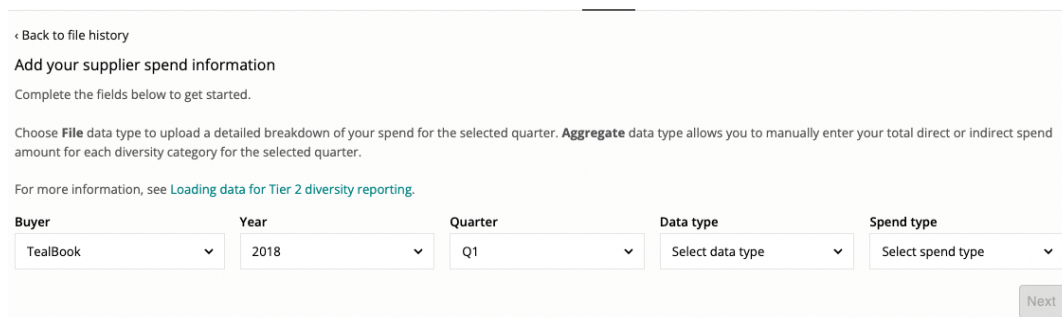
## Method 2: Direct Spend Upload

*\*This method applies if you are able to track your direct spend (diverse and non-diverse) for a specific customer.*

- Obtain your quarterly direct spend report for the customer you are reporting for. You can typically obtain this information from your **finance or procurement department**. You do not need to know which suppliers are diverse, please add all supplier spend information.
- Navigate to the **Load** tab and click the **+ Add your supplier spend information** or the **Get started** button.

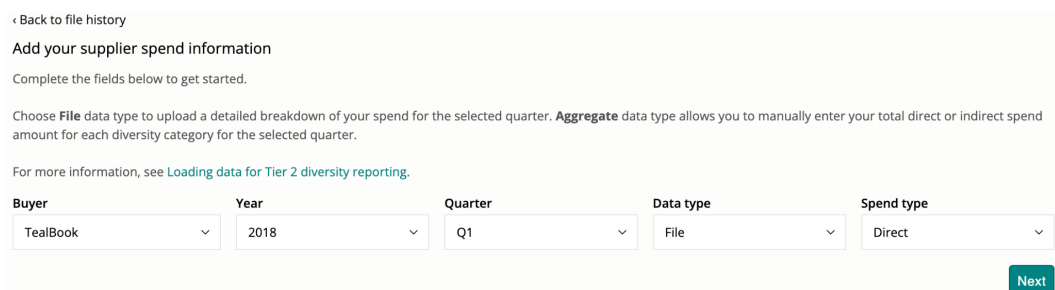


- From the **Buyer** dropdown list, select the customer you would like to add spend data for and select the **Year** and **Quarter** that you would like to report on.



The screenshot shows the 'Add your supplier spend information' form. The 'Buyer' dropdown is set to 'TealBook', 'Year' is '2018', and 'Quarter' is 'Q1'. The 'Data type' dropdown is set to 'Select data type' and 'Spend type' is 'Select spend type'. A 'Next' button is visible at the bottom right.

- From the **Data type** dropdown list, choose **File** as the data type and select **Direct** as the spend type. Click **Next**.



The screenshot shows the 'Add your supplier spend information' form. The 'Buyer' dropdown is set to 'TealBook', 'Year' is '2018', and 'Quarter' is 'Q1'. The 'Data type' dropdown is set to 'File' and 'Spend type' is 'Direct'. A 'Next' button is visible at the bottom right.


- After clicking **Next**, click on the **Download Template** button and open the Tier 2 Spend Template file.

**Upload your spend file**

- Download and open the load file template.
- Review the instructions in the **Instructions** tab, then populate your spend data under the appropriate columns in the **Details** tab.
- Save and drop the completed template into the uploader.
- Click **Upload file**.

Download spend template

**Select a quarter and upload your file**



Choose a file or drag it here.

Maximum file size is 32 MB.  
Supported files: .csv, .xlsx, .xls

Upload File


- Populate the Spend Template in the **Details Tab** with direct spend purchase for your customer. You will find the list of **mandatory fields** to enter on the **Instructions** Tab.

requestorsupplierid	name	domain	email	phone	address	amount	spenddate	category	spendgroup	spendcountry
100181	testname1	testdomain.com	contact@testdomain.com	9876543210	1234 Main St., Woodbur	1000.2	2020/01/14	technology	Direct	US

***\*Mandatory Fields Highlighted.***

- Please do not make any changes to the headers or sheet names, and delete the sample line before you get started.
- Once you have finished entering your data on the template, **save the file in** .csv, .xlsx, or .xls format.
- Upload your completed load file by either dropping it into the upload box or clicking the cloud. Browse for your load file and press the **Upload File** button.

**Select a quarter and upload your file**

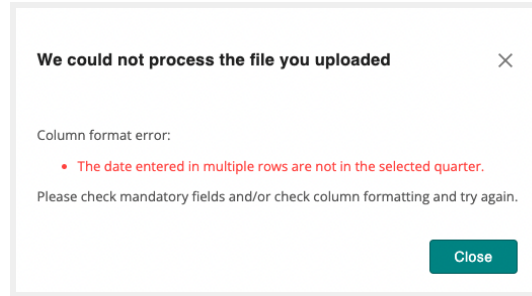


Choose a file or drag it here.

Maximum file size is 32 MB.  
Supported files: .csv, .xlsx, .xls

Upload File

- If the file upload is unsuccessful, a popup window will notify you with an explanation of what caused the error. It will also provide you with a recommended solution so you can successfully re-upload the file.



- When your spend file is successfully uploaded, it will appear in the **Upload history table** within the Load tab and its status will be changed to **Processing**. Our system will match the suppliers in your file with their supplier profiles in TealBook. This process can take between 5 to 60 minutes.
- When the file's status changes to **Complete**, click **View** to review your supplier mapping and make any required edits. If you encounter any Not Found suppliers within your upload, you can remap them. For the mapping process, please click [here](#) to learn how.

2022-Q3	2022-Q2	2022-Q1	2021-Q4	2021-Q3	2021-Q2	2021-Q1	2020-Q3	2019-Q1	2018-Q3	2018-Q2	2018-Q1
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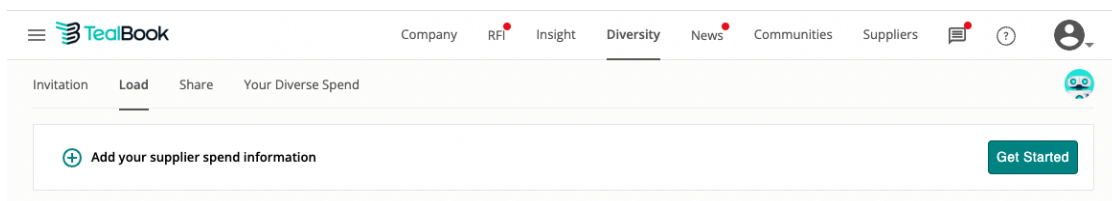
Buyer(s)	Filename	Spend Type	Upload Date	User	# Of Rows	Status	
TealBook	2018 Q1 - Testing.xlsx	Direct	Today	Ercie Hamilton	0	Processing	<div>View</div> <div>Publish</div> <div></div>

- After reviewing your supplier mapping, the next step is to **share** an allocation of your diverse spend to your customer. Head over to the [Share Allocation](#) section for the process.
- Finally, navigate to **Your Diverse Spend tab** to view your [Diversity Report](#).

## Method 3: Indirect Aggregate Upload

*\*This method applies if you are tracking your diverse spend for each diverse category and able to provide an indirect allocation factor for a specific customer.*

- Obtain your aggregate diverse spend per certification type.
- Navigate to the **Load** tab and click the **+ Add your supplier spend information** or the **Get started** button.



- From the **Buyer** dropdown list, select the customer you would like to add spend data for and select the **Year** and **Quarter** that you would like to report on.

◀ Back to file history

### Add your supplier spend information

Complete the fields below to get started.

Choose **File** data type to upload a detailed breakdown of your spend for the selected quarter. **Aggregate** data type allows you to manually enter your total direct or indirect spend amount for each diversity category for the selected quarter.

For more information, see [Loading data for Tier 2 diversity reporting](#).

Buyer	Year	Quarter	Data type	Spend type
TealBook	2018	Q1	Select data type	Select spend type

Next

- From the **Data type** dropdown list, choose **Aggregate** and select **Indirect** as the spend type. Click **Next**.

◀ Back to file history

### Add your supplier spend information

Complete the fields below to get started.

Choose **File** data type to upload a detailed breakdown of your spend for the selected quarter. **Aggregate** data type allows you to manually enter your total direct or indirect spend amount for each diversity category for the selected quarter.

For more information, see [Loading data for Tier 2 diversity reporting](#).

Buyer	Year	Quarter	Data type	Spend type
TealBook	2018	Q1	Aggregate	<div> <div>✓ Select spend type</div> <div>Direct</div> <div>Indirect</div> </div>

- Click **New Category** and select the **Diverse Category** you would like to enter spend for. Enter the sub type if applicable.

2018-Q1 \$0 USD

Diverse Category		
X HubZone Certified	Native American	Spend in USD
<div>New Category</div>		

- Enter the spend amount in **USD** for the specified category.

2018-Q1 \$60,000 USD

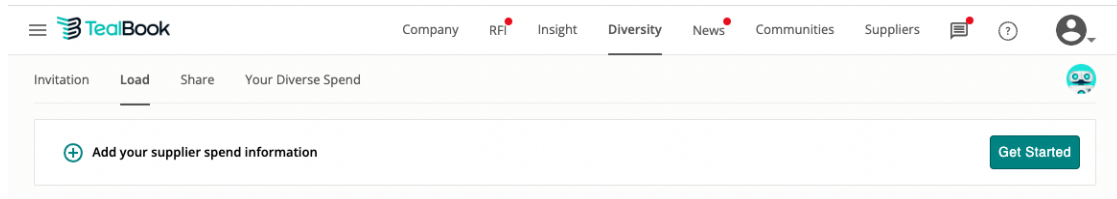
Diverse Category		
X HubZone Certified	Native American	50000
X LGBT Owned Business Enterprise		10000
<div>New Category</div>		

- Repeat this process for each category that you would like to enter, spend for and click **Save**.
- From here, the next step is to **share** an allocation of your diverse spend to your customer. Head over to the [Share Allocation](#) section for the process.

## Method 4: Direct Aggregate Upload

*\*This method applies if you are tracking your diverse spend for each diverse category and able to provide a direct spend amount for a specific customer per diverse category.*

- Obtain your direct aggregate diverse spend per certification type for your customer.
- Navigate to the **Load** tab and click the **+ Add your supplier spend information** or the **Get started** button.



- From the **Buyer** dropdown list, select the customer you would like to add spend data for and select the **Year** and **Quarter** that you would like to report on.

◀ Back to file history

### Add your supplier spend information

Complete the fields below to get started.

Choose **File** data type to upload a detailed breakdown of your spend for the selected quarter. **Aggregate** data type allows you to manually enter your total direct or indirect spend amount for each diversity category for the selected quarter.

For more information, see [Loading data for Tier 2 diversity reporting](#).

Buyer	Year	Quarter	Data type	Spend type
TealBook	2018	Q1	Select data type	Select spend type

Next

- From the **Data type** dropdown list, choose **Aggregate** and select **Direct** as the spend type. Click **Next**.

◀ Back to file history

### Add your supplier spend information

Complete the fields below to get started.

Choose **File** data type to upload a detailed breakdown of your spend for the selected quarter. **Aggregate** data type allows you to manually enter your total direct or indirect spend amount for each diversity category for the selected quarter.

For more information, see [Loading data for Tier 2 diversity reporting](#).

Buyer	Year	Quarter	Data type	Spend type
TealBook	2018	Q1	Aggregate	<div>             ✓ Select spend type              Direct              Indirect           </div>

- Click **New Category** and select the **Diverse Category** you would like to enter spend for. Enter the sub type if applicable.

2018-Q1

\$0 USD

Diverse Category

X HubZone Certified

Native American

Spend in USD

New Category

- Enter the spend amount in **USD** for the specified category.

2018-Q1

\$60,000 USD

Diverse Category

X HubZone Certified

Native American

50000

X LGBT Owned Business Enterprise

10000

New Category

- Repeat this process for each category that you would like to enter spend for and click **Save**.
- FOR \$0 DIVERSE SPEND:** If you have \$0 diverse spend to report, select a random diversity category and enter \$0 and click Save.

2018-Q1

\$0 USD

Diverse Category

X Veteran Owned Small Business

0

New Category

- From here, the next step is to **share** an allocation of your diverse spend to your customer. Head over to the [Share Allocation](#) section for the process.

## Frequently Asked Questions

### How do I calculate my Indirect Allocation Factor?

- Indirect spend addresses payments made to diverse suppliers, for subcontracting that does not directly relate to the Customer contract. This expenditure is proportionally allocated using the **Indirect Allocation Factor** formula (see below).
- **(Total quarterly sales to Customer / Total quarterly company sales) x 100 = Indirect Allocation Factor %**

### What is the difference between Direct and Indirect spend?

- **Direct Tier 2 Spend:** Direct Spend refers to reporting subcontracting expenditure with diverse suppliers for services/products that directly support and can be traced back to performing work under your customer contract.
- **Indirect Tier 2 Spend:** Indirect spend addresses payments made to diverse suppliers, for subcontracting that does not directly relate to the Customer contract. This expenditure is proportionally allocated using the Indirect Allocation Factor formula.

### How secure is the data I am providing and how will it be used?

- TealBook will only share summarized spend information by diverse category once you, the supplier, specifically select the customer to share it with. Should the supplier choose to share, the customer will be able to see a summary of the total diverse spend per quarter allocated to them only.

### My company does not track diverse expenditures. How should I proceed?

- This is not a problem! You do not need to know your diverse spend in order to participate. You would upload your complete supplier spend master into TealBook and our Machine Learning and AI capabilities will match your Detailed Spend File against our global database of diverse suppliers. The benefit to you in this case will be receiving your own Tier One Diversity report for future use.

### How can I contact TealBook?

- You can contact us at [suppliersupport@tealbook.com](mailto:suppliersupport@tealbook.com)

### Which upload method should I choose?

- Please use the decision map below to guide you on which upload process best suits your organization.



*\*If you are uploading Indirect Aggregate Spend and also your Direct Supplier Spend, please use both Method 2 and 3.\**