

What is Tier 2 Diversity Reporting?

Tier 2 Diversity Reporting is a process that allows suppliers to share their diverse spend with their customers. This enables organizations to recognize both their direct spend with diverse suppliers and the indirect impact of spending with non-diverse suppliers who themselves engage with diverse businesses.

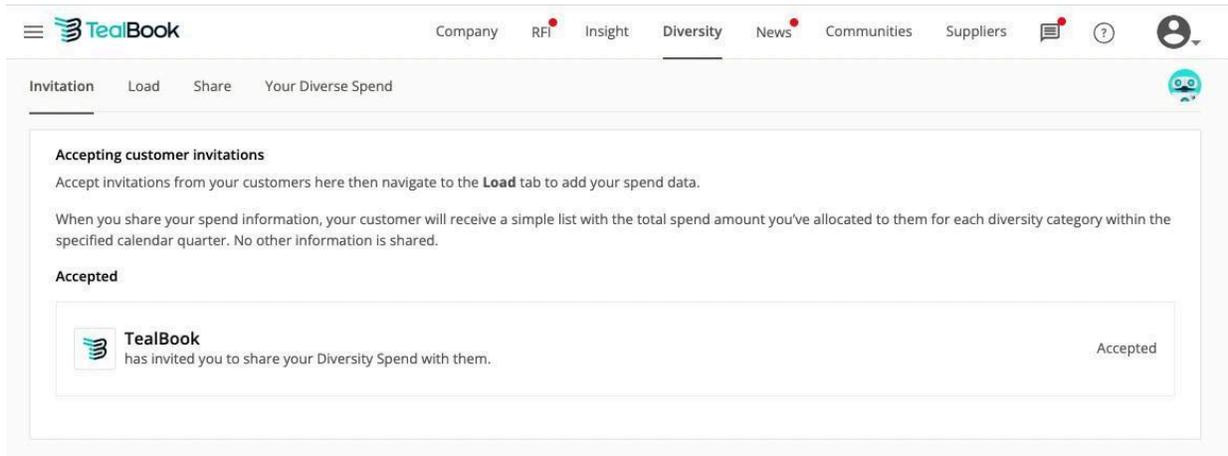
When selecting suppliers or establishing a strategic supplier program, large organizations prioritize doing business with companies that promote equality, innovation, and sustainability.

TealBook's Tier 2 reporting solution empowers all companies, even those without formal diversity programs, to help their customers meet diversity spending goals. Companies upload spend data once per quarter via TealBook's secure platform. TealBook then identifies diverse suppliers within the provided spend and generates a free, summary-level diversity report for participating companies.

Supplier Upload Process

Getting Started: Accepting Your Invitation

Upon receiving your invitation email, click on your unique access link to enter the Tealbook platform. Under the **Diversity** tab, you will see all buyers who have invited your organization to participate in Tier 2 Diversity Reporting. Click **Accept** to begin the upload process.



(For demonstration purposes, the following instructions use our company profile)

Upload Methods

Method 1: Full Spend Upload

For suppliers able to provide a full quarterly supplier spend file, regardless of whether suppliers are diverse or non-diverse.

Steps:

1. Obtain your full Supplier Spend Master for the quarter (typically available from your finance or procurement team).
2. Navigate to the **Load** tab and click **+ Add your supplier spend information** or **Get Started**:



- From the **Buyer** dropdown, select the customer, year, and quarter:

[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**

- From the **Data type** dropdown, choose **File** and **Full Spend**:

[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**

- Download the **Tier 2 Spend Template**, populate the **Details** tab (mandatory fields listed in **Instructions** tab), and save it as .csv, .xlsx, or .xls:
 - 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 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**.

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

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

(Mandatory fields highlighted)

6. Upload the completed file. If there is an error, a popup will explain how to fix it:

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

- 7. Once successfully uploaded, your file status will change to **Processing** (takes 5-60 minutes).
- 8. When complete, click **View** to review supplier mappings:

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																				
<table border="1"><thead><tr><th>Buyer(s)</th><th>Filename</th><th>Spend Type</th><th>Upload Date</th><th>User</th><th># Of Rows</th><th>Status</th><td></td><td></td><td></td></tr></thead><tbody><tr><td>TealBook</td><td>2018 Q1 - Testing.xlsx</td><td>Full spend</td><td>09/07/2022</td><td>Ercie Hamilton</td><td>3</td><td>Published</td><td>View</td><td>Publish</td><td></td></tr></tbody></table>														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	
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																									

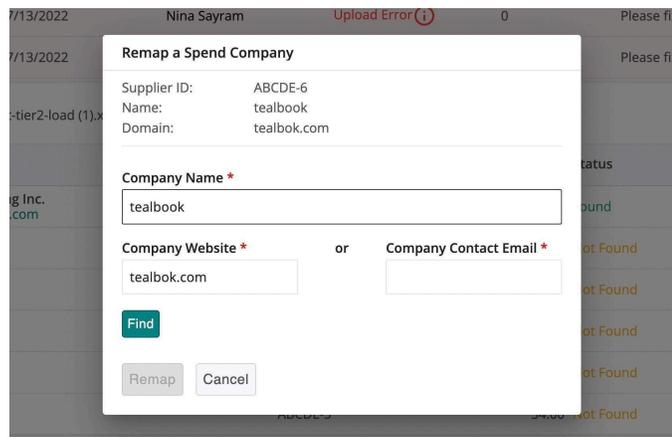
Please check mandatory fields and/or check column formatting and try again.

[Close](#)

Mapping Process

If a supplier is **Not Found**, click the **Pencil icon** to manually map using the supplier's website or contact email:

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



Remap a Spend Company

Supplier ID: ABCDE-6
 Name: tealbook
 Domain: tealbok.com

Company Name *

Company Website * or Company Contact Email *

Find **Remap** **Cancel**

After mapping, navigate to the file history table and click **Publish**:

TealBook	2018 Q1 - Testing.xlsx	Full spend	Today	Ercie Hamilton	3	Complete	View	Publish	
----------	------------------------	------------	-------	----------------	---	----------	-------------	----------------	---

Share Allocation

After entering spend data, allocate diverse spend to your customer:

Formula:

$(\text{Total Quarterly Sales to Customer} / \text{Total Quarterly Company Sales}) \times 100 = \text{Indirect Allocation Factor (\%)}$

- Navigate to the **Share** tab.
- Find the specific customer, year, and quarter.
- Enter the Indirect Allocation Factor (%) in the allocation box:

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 and suppliers were hired specifically for a customer’s contract, enter **100%** in the **Direct Spend** field for those suppliers:

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="5"/> <input type="text" value="Simcon Company"/>	
		Total Shared: \$4,673.45
		<input type="button" value="Preview"/> <input type="button" value="Share"/>

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"/>
		Total Shared: \$75,597.27
		<input type="button" value="Preview"/> <input type="button" value="Share"/>

Privacy Notice:

Only total aggregate amounts by diversity category are shared. Customers cannot view your supplier list, total revenue, or total diverse spend:

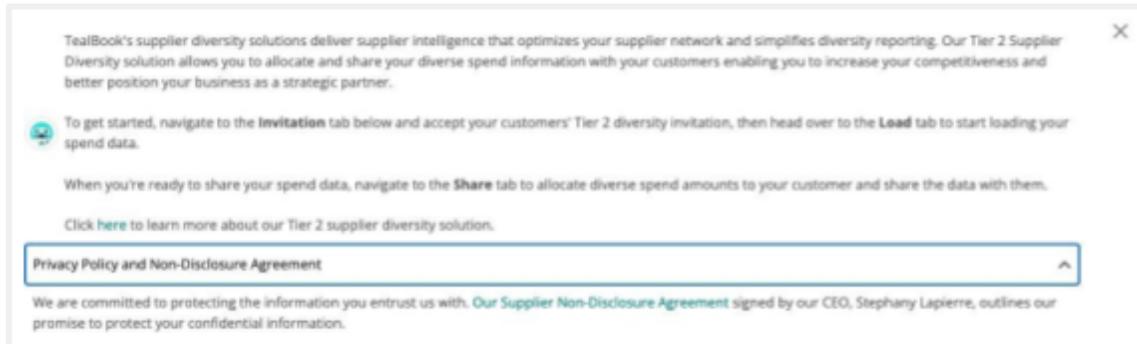


Preview Share	
The following information is a preview of what you will be sharing with TealBook for 2018 Q1	
Small Business Enterprise (SBE)	\$75,126.97
Small Disadvantaged Business (SDB)	\$470.31

Close

Need an NDA?

Download a one-sided NDA signed by our CEO under the **Privacy and Non-Disclosure Agreement** section. For a mutual NDA, please contact suppliersupport@tealbook.com.



TealBook's supplier diversity solutions deliver supplier intelligence that optimizes your supplier network and simplifies diversity reporting. Our Tier 2 Supplier Diversity solution allows you to allocate and share your diverse spend information with your customers enabling you to increase your competitiveness and better position your business as a strategic partner.

To get started, navigate to the **Invitation** tab below and accept your customers' Tier 2 diversity invitation, then head over to the **Lead** tab to start loading your spend data.

When you're ready to share your spend data, navigate to the **Share** tab to allocate diverse spend amounts to your customer and share the data with them.

[Click here](#) to learn more about our Tier 2 supplier diversity solution.

Privacy Policy and Non-Disclosure Agreement

We are committed to protecting the information you entrust us with. Our [Supplier Non-Disclosure Agreement](#) signed by our CEO, Stephany Lapierre, outlines our promise to protect your confidential information.

Finally, click **Share** and **Confirm** to complete the process and access your **Diversity Report**:

Confirmation

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

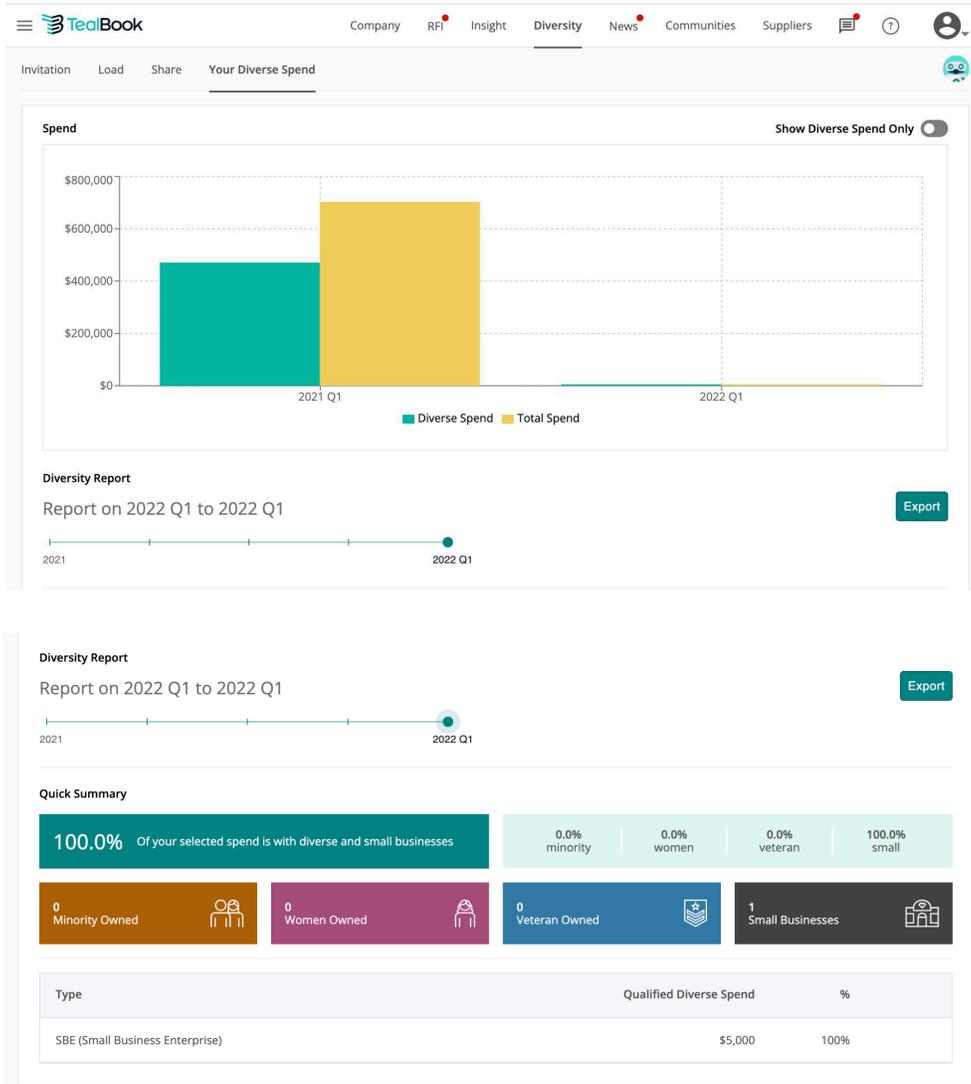
Confirm

Diversity Report

TealBook provides a free, summary-level Diversity Report to participating suppliers, including:

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

Access your Diversity Report under the **Your Diverse Spend** tab:



If you see value in TealBook's services and would like to explore our **Managed Tier 2 Program**, please contact suppliersupport@tealbook.com.

Method 2: Direct Spend Upload

For suppliers able to track direct spend (diverse and non-diverse) for a specific customer.

Steps:

1. Obtain your direct quarterly spend report for the customer.
2. Upload using the **Load** tab and select **Direct** spend type.
3. Populate and upload the template, following the same process as Method 1.
4. Map suppliers as needed and allocate diverse spend.
5. View your Diversity Report under **Your Diverse Spend** tab.

Method 3: Indirect Aggregate Upload

For suppliers tracking diverse spend per category/certification, providing an indirect allocation factor (%).

Steps:

1. Obtain aggregate diverse spend per category/certification type.
2. Select **Aggregate > Indirect** as the spend type in the **Load** tab.
3. Add a new category for each diverse spend type and input spend amounts.
4. Allocate spend under the **Share** tab.

Method 4: Direct Aggregate Upload

For suppliers providing direct diverse spend per category/certification for a specific customer.

Steps:

1. Obtain direct aggregate diverse spend for the customer.
2. Select **Aggregate > Direct** as the spend type in the **Load** tab.
3. Add diverse categories and input spend amounts.
 - a. If you have **\$0 diverse spend**, select a random category, enter \$0, and save.
4. Allocate spend under the **Share** tab.

Frequently Asked Questions

How do I calculate my Indirect Allocation Factor (%)?

$(\text{Total Quarterly Sales to Customer} / \text{Total Quarterly Company Sales}) \times 100 = \text{Indirect Allocation Factor (\%)}$

What is the difference between Direct and Indirect spend?

Direct Spend: Spend directly related to fulfilling a customer's contract.

Indirect Spend: Spend that is not directly tied to a customer contract, proportionally allocated.

How secure is the data I provide?

TealBook only shares summarized, customer-specific data after you select to share.

My company does not track diverse expenditures. Can I still participate?

Yes! Upload your full supplier spend. TealBook will identify diverse suppliers using its AI capabilities.

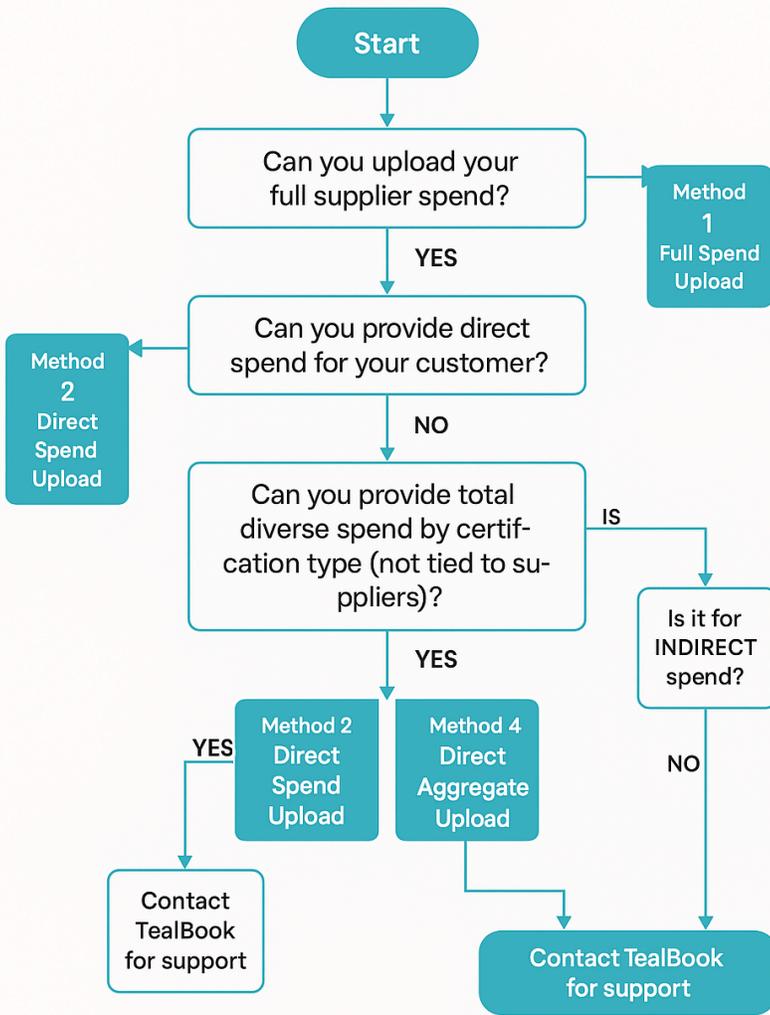
How can I contact TealBook?

Email us at suppliersupport@tealbook.com.

Which upload method should I choose?

Refer to the decision map below.

WHICH UPLOAD METHOD SHOULD I USE?



(If uploading both Indirect Aggregate Spend and Direct Supplier Spend, use Methods 2 and 3)