

Tier 2 Supplier Training - CSP

Supplier Tier 2 Diverse Spend Report Training

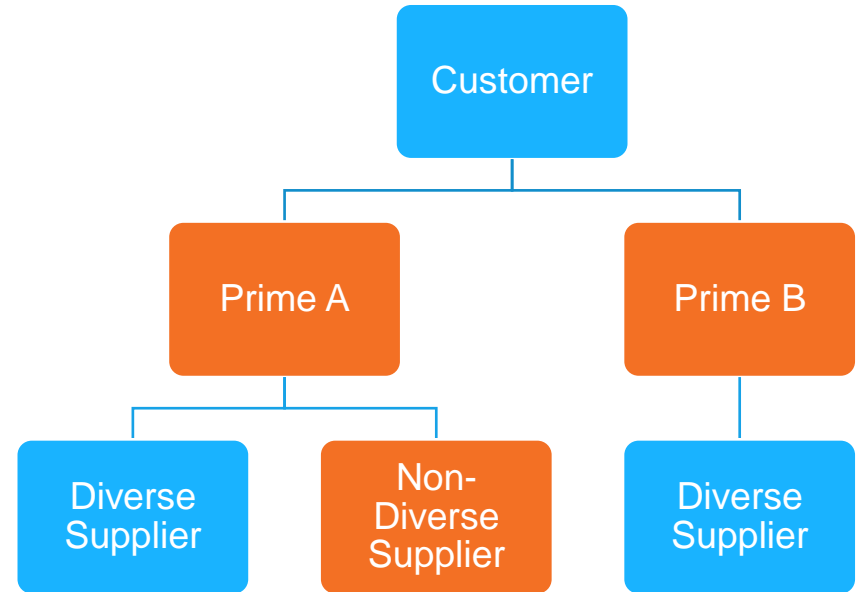


Agenda

- Diversity Reporting Terms
- Diverse Spend Submission Demo
- Q&A

Supplier Diversity Terms

- Tier 2 Supplier – A diverse supplier that is used by a Prime (Tier 1) Supplier for goods and/or services that are provided to a Buyer (Customer).
- Tier 2 Spend – Spend from a Prime Supplier derived from subcontracting with Diverse suppliers.
- Diverse Classifications – Multi-letter acronyms used to identify diverse business (i.e. MBE, WBE, LGBTBE, etc.)
- Certification – Acknowledgement from a third-party agency certifying that the diverse business meets the ownership and/or size criteria to be recognized as a certified diverse business.



Types of Reportable Diverse Spend



Direct Spend

Any spend with a diverse supplier directly relates to your contract with Customer. (i.e. Raw materials, hardware, equipment etc.)



Indirect Spend

Any spend with a diverse supplier that relates to your company's day-to-day business operations, which is not necessarily related to the contractual obligations to the Customer. Ex. Janitorial services, building services, etc.



Allocation Factor

The percentage of your sales to your customer compared to your company's total sales.

**The Allocation Factor is required when reporting Indirect Spend.*

Submitting Diverse Spend

- Reporting Requirements
- CSP Registration
- Inviting Users and Permission Granting
- Connection Requests
- Diverse Spend Submission Demo
- Editing Submissions

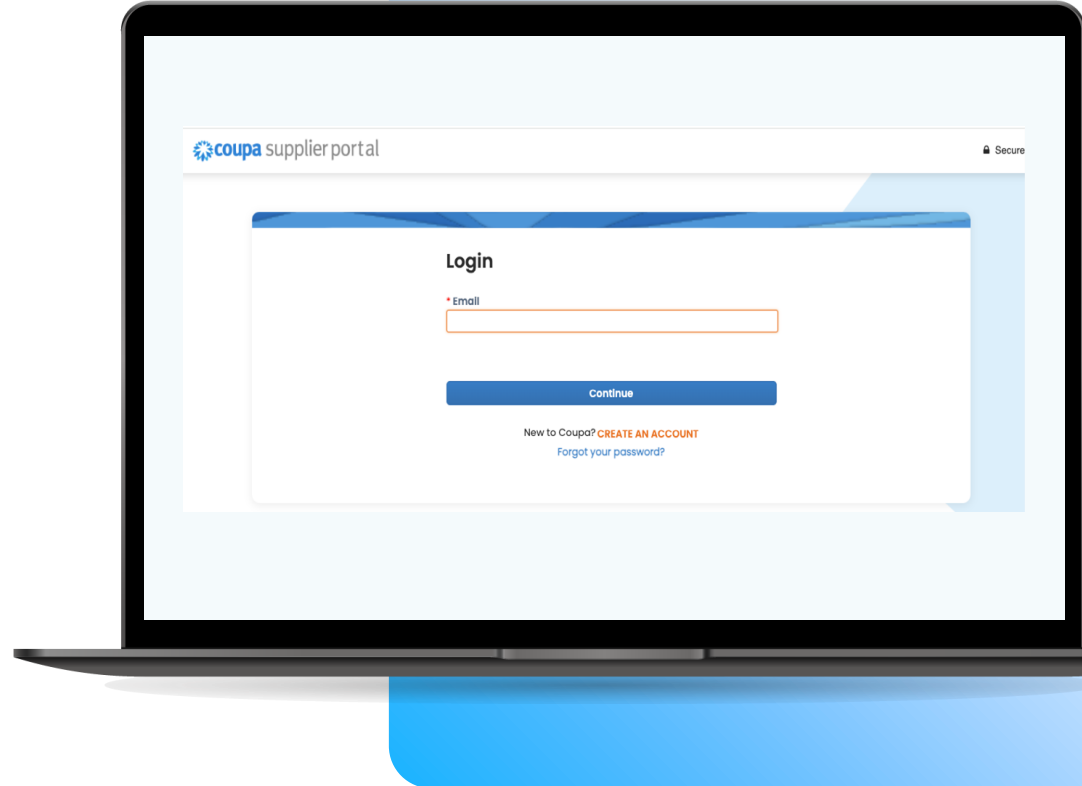
Reporting Requirements

- Prime Suppliers are to report diverse spend, which is Tier 2 spend to the customer, utilizing Coupa's supplier platform. This may include direct and/or indirect spend.
- Diverse spend is to be reported in the preferred cadence of the customer (i.e. Quarterly, Semi-Annually, Monthly, etc.)

**Coupa's proprietary software is used to aggregate all diverse spend into one report for your customer.*

Demonstration of Coupa Supplier Portal

- CSP - Coupa Supplier Portal
<https://supplier.coupa.com>
- Diversity contact needs be invited to register by the Primary contact or Admin User from the company's CSP profile.



Coupa Supplier Portal User Access

- Primary contact or Admin User will grant access for diversity contact.
- Primary contact or Admin User will grant only “Profile” permissions to Diversity Contact.
- The diversity contact will have the ability to receive and complete Tier 2 Request.

Invite User

First Name

Last Name

* Email

Permissions

- All
- Admin
- Orders
- Restricted Access to Orders
 - All
 - Invoices
 - Catalogs
 - Profiles
 - ASNs
 - Service/Time Sheets
- Restricted Access to Service/Time Sheets
 - All
 - Payments
 - Order Changes
 - Early Payments
 - Business Performance
 - Sourcing
 - Order Line Confirmation
 - Forecast Planner
- Workers
 - View
 - Manage
- Worker Assignments
 - View
 - Manage

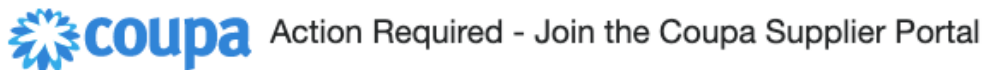
Customers

- All
- Coupa - ABC Company
- Coupa - ABC Company

Cancel Send Invitation

Invite Notification

Subject: Action Required - Join the Coupa Supplier Portal



Hi John Doe,

A coworker invited you to join their account on Coupa. Once registered, you can view and manage purchase orders, create and manage invoices, get real-time SMS alerts for these transactions, and much more.

Find out more using the links below, and use the button to register. Welcome!

[Join Coupa Supplier Portal](#)



Business Spend Management

Create User Account

Create an Account

Grow your Business on Coupa with a Free Account

* Business Name

ConnXus

Your legal business name (or legal personal name if an individual)

* Email

kmgw31@aol.com

* First Name

John

* Last Name

Doe

* Password



* Confirm Password



Use at least 8 characters and include a number and a letter.

* Country/Region



* Tax Registration 

#####

I do not have a Tax ID

I accept the [Privacy Policy](#) and the [Terms of Use](#)

Create an Account

Coupa Supplier Portal



Profile

Verify Your Account

Coupa Verified makes your account more visible and trusted by thousands of customers.

Get Verified



AC

ABC Company

Get Verified

Profile Progress **24%** Last Updated: about 22 hours ago | [View Profile](#) | [View Admins](#)

Recent Activity

View ▾ ⓘ

Coupa - ABC Company

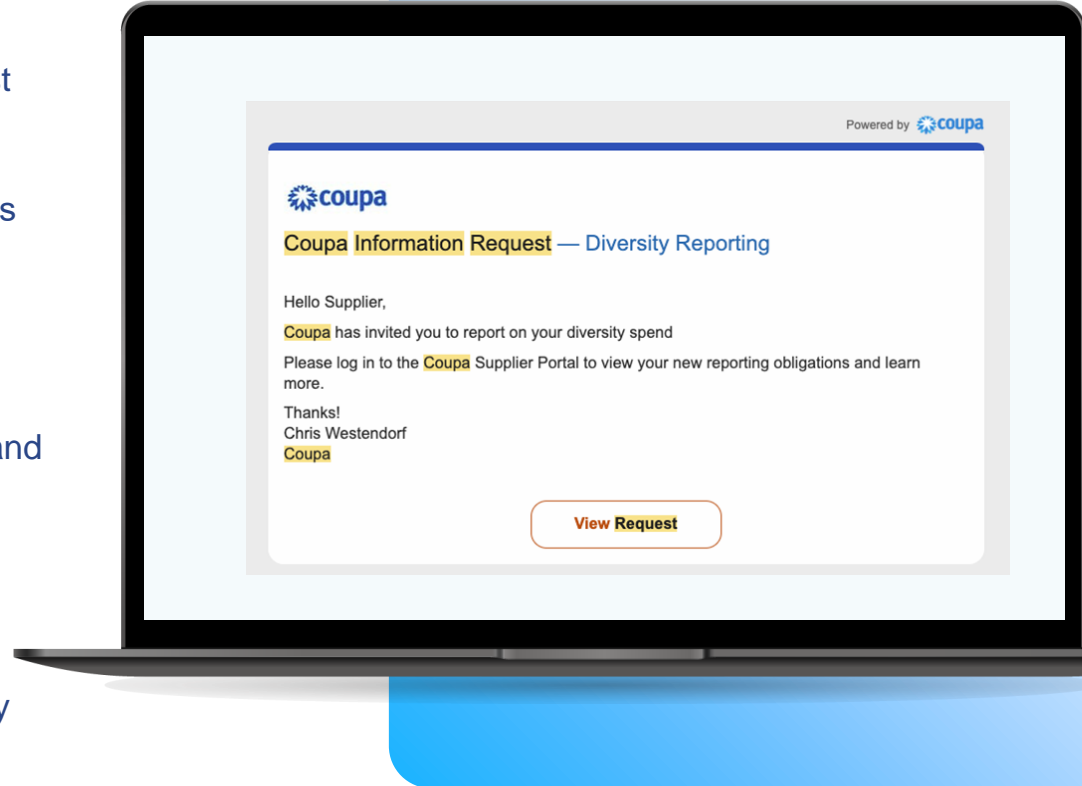
No activity found for Coupa - ABC Company.

Announcements

No Announcements

Diverse Spend Submission Demo

- Suppliers will receive a Tier 2 Report request via email.
- The “View Request” button will take suppliers directly to the supplier CSP account to login and view the Tier 2 Report.
- Spend reports are submitted via CSV templates. These templates can be saved and used again to report.
- Submitted reports can still be edited in the CSP profile.
- If suppliers do not have spend to report, they are still required to respond to the request indicating no spend.



Tier 2 Request Notifications

Coupa Information Request — Diversity Reporting External ⌵ Inbox ×

do_not_reply@supplier-diversity-esg.coupacloud.com
to me ▾

Caution: External email. Please be aware when clicking links or attachments.

Powered by 



Coupa Information Request — Diversity Reporting

Hello Supplier,

Coupa has invited you to report on your diversity spend

Please log in to the Coupa Supplier Portal to view your new reporting obligations and learn more.

Thanks!

Chris Westendorf

Coupa

[View Request](#)

Diversity reporting.

Tier 2 Report

Coupa - ABC Company

Profile

Supplier Diversity Report (System Form)

Supplier Diversity Report (System Form)

Supplier Information

ABC Company

• Tier 2 Diversity

Instruction

Thank you for taking the time to report your Tier 2 Diversity Spend. Please download the required template(s) below, enter any necessary information, and re-upload the templates to this form. For more detailed instructions, click [here](#).

• Report Name

NAM-FY25 TEST

• Reporting Period

Tier 2 Report

Allowed Categories

Ability One Program (ABILITYONE), Alaskan Native Corporation (ANC), Disability Owned Business (DOB), Disabled Veteran Business Enterprise (DVBE), Historically Underutilized Business Zone (HUBZone), Indigenous Owned Business (IOB-CA), Minority Owned Business Enterprise (MBE), Lesbian, Gay, Bisexual, Transgender Business Enterprise (LGBTBE), Small Business Enterprise (SBE), Small Disadvantaged Business (SDB), Veteran Owned Business (VOB), Woman Owned Business Enterprise (WBE), Woman Owned Small Business (WOSB)

* Do you have Direct Spend data to provide?

 x v

Direct Spend

[Download Template](#)

* Direct Spend Report attachment upload prompted to prime supplier

 No file chosen

* Do you have Indirect Spend data to provide?

 v

* Acknowledgement

By checking the box below I attest that the information provided above is true and accurate to the best of my knowledge

Decline

Save

Submit for Approval

Direct Spend Submission

The screenshot shows an Excel spreadsheet with the following structure:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Company Name	Diversity Type	Total Purchases	Currency	Certificate Type	Certificate Number	Expiration Date						
2													
3													
4													
5													
6													
7													
8													
9													
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32													

Direct Spend Fields

Field	Description	Column
Company Name	The name of the diverse supplier whose products and services can be directly linked to your work for your customer.	A
Diversity Type	The multi-letter diversity code for the diversity category/categories that applies/apply to each diverse supplier. If the supplier has multiple diversity categories, please list all category acronyms in the cell, separated by a comma.	B
Total Purchases	The total amount of diverse spend with a diverse supplier within the requested period that directly relates to your contractual obligations of providing goods and services to your customer.	C
Currency	The currency used to complete your purchases within the specific diversity type. (i.e. USD, CAD, GBP, etc.)	D
Certificate Type*	The name of the certifying agency responsible for certifying the supplier's diversity status. If the supplier has multiple certifications, list all agencies separated by a comma.	E
Certificate Number*	If applicable, provide the certificate number associated with this supplier's diversity certification. If the supplier has multiple certifications, list all certification numbers separated by commas.	F
Expiration Date*	If applicable, provide the expiration date for the supplier's certification (dd/mm/yyyy). If the supplier has multiple certifications, list all expiration dates separated by a comma.	G

**Columns E, F, and G for certificate metadata are not required. If you have certificate information, we highly recommend that you include it.*

Direct Spend Submission

The screenshot shows the Microsoft Excel interface with the following data in the spreadsheet:

	A	B	C	D	E	F	G	H	I
1	Company Name	Diversity Type	Total Purchases	Currency	Certificate Type	Certificate Number	Expiration Date		
2	TEST COMPANY 1	MBE	\$7,494.25	USD	National Minority Supplier Development Council	SC8898	10/31/25		
3	TEST COMPANY 1	WBE	\$3,000	USD	WBENC	SC8819	10/31/25		
4	TEST COMPANY 2	VOB	\$1,256.97	USD					
5	TEST COMPANY 3	SBE	\$1,563	USD	State of Ohio	SC55555	10/31/25		
6									
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27									

Direct Spend Fields

- Only include suppliers that:
 - Are of a diversity type accepted by your customer
 - You have spend with over the requested reporting period
 - Provided goods or services specific to your work for the requesting customer
- Columns A-D are required and must be completed to import the file.
- The Certification Field is not mandatory but please check with your Customer on their reporting guidelines.

Indirect Spend Submission

The screenshot shows a Microsoft Excel spreadsheet titled "supplier_diversity_report_indirect_spend_list (7)". The ribbon is set to "Home". The spreadsheet has the following structure:

	A	B	C	D	E	F	G
1	Diversity Type	Ethnicity	Total Purchases	Currency	Total sales in Reporting Period	Total sales with Requesting Customer in Reporting Period	
2	ANC						
3	DOB						
4	DVBE						
5	DBE						
6	EDWOSB						
7	LGBTBE						
8	MBE	African American					
9	MBE	Asian Indian American					
10	MBE	Asian Pacific American					
11	MBE	Hispanic American					
12	MBE	Native American					
13	MBE	Other Ethnic Minority					
14	SBA8A						
15	SDVBE						
16	SDVOSB						
17	SBE						
18	SDB						
19	VOB						
20	VVO						
21	WBE						
22	WOSB						
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Indirect Spend Fields

Field	Description	Column
Diversity Type	List of diversity categories that you report against, which must be consistent with the categories your customer allows. Any categories you have spend for that are not allowed by your customer must be removed for successful report submission. You may only report spend for categories permitted by your customer.	A
Ethnicity	Ethnicity is required only for the Minority Business Enterprise (MBE) diversity type. Any ethnicity that does not have reportable spend must be removed from the template prior to submission.	B
Total Purchases	The total amount of diverse spend your company has made with diverse suppliers, aggregated at the diversity category level during the reporting period.	C
Currency	The currency used to complete your purchases within the specific diversity type. (i.e. USD, CAD, GBP, etc.)	D
Total Sales in Reporting Period	This is your company's total sales to all customers within the reporting period. This figure is required in order to assist in allocating a portion of your company's Indirect Spend to your customer.	E
Total Sales with Requesting Customer in Reporting Period	This is your company's sales within the reporting period only with the customer requesting your diverse spend submission. This figure is required in order to assist in allocating a portion of your company's Indirect Spend to your customer.	F

Indirect Spend Submission

The screenshot shows an Excel spreadsheet titled "indirect_spend_report (8) - Saved to my Mac". The ribbon is set to "Home". The spreadsheet data is as follows:

	A	B	C	D	E	F	G	H
1	Diversity Type	Ethnicity	Total Purchases	Currency	Total sales in Reporting Period	Total sales with Requesting Customer in Reporting Period		
2	LGBTBE		\$2,400.67	USD	\$2,000,000.00	\$50,000.00		
3	MBE	African American	\$2,000.00	USD	\$2,000,000.00	\$50,000.00		
4	WBE		\$4,500.55	USD	\$2,000,000.00	\$50,000.00		
5	VOB		\$3,000.00	USD	\$2,000,000.00	\$50,000.00		
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Indirect Spend Fields

- The Prime supplier is required to provide their sales to the customer for the reporting period, as well as their total company sales for the reporting period.
 - Because of the nature of what Indirect Spend is, the customer is not able to get 100% of this spend. Instead, the reporting capability calculates an allocation factor.
- Ethnicity is required for the Minority Business Enterprise (MBE) diversity type. Leave this column blank for other diversity types.
- Please make sure to remove any Diversity Types you are not reporting on from your file.

Tier 2 Reporting Next Steps

- Supplier's will have 30 days to respond and complete their report in their CSP profile.
- Once your report is submitted, you will receive a notification of the report status. (Ex. Approved or Rejected)
- If you do not complete the report in 30 days, your Tier 2 request will expire.

Tier 2 Request Reminders

Coupa's first reminder to update your information External SIM x

do_not_reply@supplierdiversity-demo.coupacloud.com
to me ▾

Caution: External email. Please be aware when clicking links or attachments.

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 Coupa

Reminder from Coupa

Hi Acme Co.,

Coupa reminds you to update your information so that they have what's needed to transact with you.


If you've already filled in the request form and received this email, then you have not submitted your response. To submit it, please click on the "Review" button on the request form.


 Coupa

Business Spend Management

Tier 2 Request Reminders

[PROOF] Action Required: Acme Supplier Diversity Tier 2 Program Training x

 → **Acme Supplier Diversity Team** donotreply@supplier.coupa.com via amazonses.com Mon, Sep 9, 3:35 PM ☆
to chris.westendorf, me, ben.zumkehr ▾



Dear Valued Partner,

Acme has engaged Coupa to help collect your company's diversity spend information for [reporting quarter] as part of our Supplier Diversity Program.

You should have received an email from do_not_reply@acme.coupahost.com with a link to access our Tier 2 Spend Report information form in the Coupa Supplier Portal. Please complete the form by [date] to report your spend with diverse suppliers for the quarter.

If there's a different contact who can provide this information, please forward this email to that person and click the button below to update your contact details for Acme's records:

[UPDATE CONTACT](#)

Tier 2 Diversity Report Submission



Profile

Your Profile

Information Requests

Performance Evaluation

Subscriptions

Coupa - ABC Company

Profile

Coupa - ABC Company ▾

Your information has been submitted



Supplier Diversity Report (System Form)

Supplier Diversity Report (System Form)

Pending Approval



Supplier Information

ABC Company

• Tier 2 Diversity

Tier 2 Diversity Report Approval

I. Please be aware when clicking links or attachments.

Powered by  coupa



Profile Info submitted to Coupa was Approved

Hi Kayla,

The company profile information that you submitted to your customer, Coupa was recently approved.

This usually means that the information was correct and they will activate your new information so you can start transacting soon (or continue transacting with the new information).

No further action is required but you can click below to view additional details.

[View Profile Info](#)



Support



Coupa Supplier Diversity Support:

Support Email: supplier_diversity@coupa.com
(please include your Customer's name in the subject line)

Coupa Supplier Resources



Coupa Supplier Resources:

Coupa supplier website: <https://supplier.coupa.com/>



General questions on the Coupa Supplier Portal:

Supplier Support Email: supplier@coupa.com

Training Webinars: [Register Here](#)



Certification Resources:

Supplier website: <https://supplier.coupa.com/certifications/>

Q&A

Please take yourself off mute or submit any questions in the Chat or Q&A sections of the meeting.

Thank You