



# Vendor Quick Start – New Vendors

## Who Is This For?

Use this guide if you are a new Vendor invited by ATB to complete onboarding in the ATB Ivalua Vendor Portal.

## What You Need to Do

As a new Vendor, you may be required to:

- Complete your company profile
- Upload required documents and provide banking information (if applicable)
- Submit onboarding information through the portal

## Why This Matters

The **ATB Ivalua Vendor Portal** is the platform ATB uses to manage contracts and Vendor relationships. Completing the onboarding process is essential because it ensures:

- **Security & Compliance:** We partner to meet ATB's security and regulatory standards, establishing a secure foundation for our business relationship.
- **Payment Accuracy:** Your current banking and tax information is on file, preventing delays in processing invoices.
- **Unified Communication:** You have a primary channel for managing your relationship and documents with ATB.

## How to Get Started

*Note: For a visual walkthrough of these steps, refer to the Onboarding Details (Reference) section of this document, which includes screenshots of the portal interface.*

### Step 1: Access the ATB Ivalua Vendor Portal

- Open the ATB invitation email from ATB Ivalua <no-reply@ivalua.atb.com>
- Select the link to the Vendor Portal
- Log in using your email address and set your password (first-time users)

### Step 2: Complete Your Company Profile

- Navigate to **Company Profile** in the **General Info.** Menu
- Review and complete all required sections
- Required fields are marked with an asterisk (\*)



- Click 'Start Onboarding' to submit your information

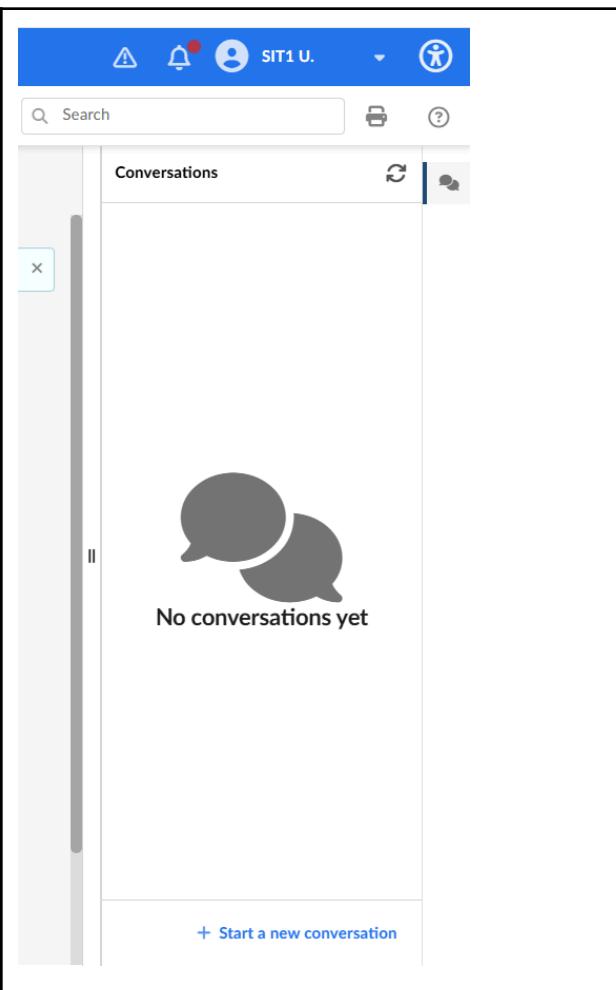
## Key Sections to Complete

- **Company Information:** Payee Name (name on Invoice), Legal Name, Address
- **Contacts:** Confirm company contact information
- **Documents:** Upload required documentation
- **Banking Information:** Securely enter and submit banking details for payments

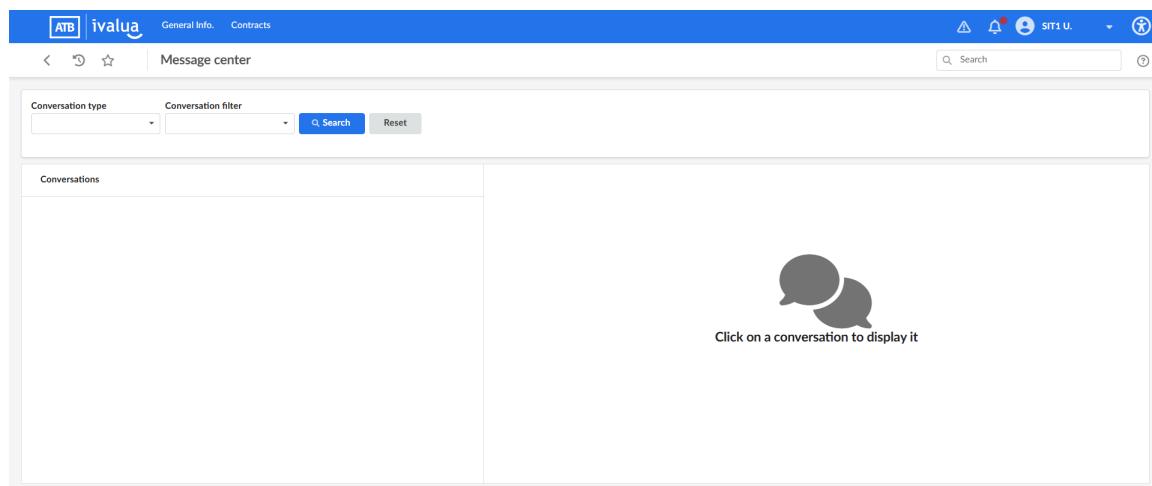
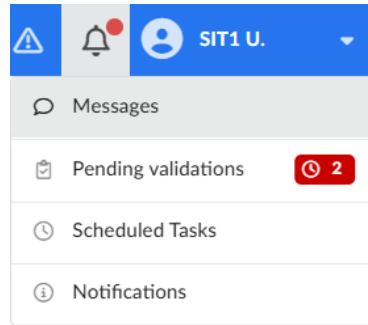
## Need Help?

### Onboarding Support

- Contact your **ATB representative** using the **Conversation** feature in the **right-hand panel** in the Company Profile or the **Notifications** feature in the **header bar**

<p>Click on the <b>Conversations</b> icon in the right-hand panel to open the Conversations panel.</p> <p>Click on the <b>+ Start a new conversation</b> link at the bottom of the Conversations panel to begin a discussion.</p>	
---	---

Alternatively, click the **Notifications**  icon in the header bar and select **Messages** to open the **Message Center**. Here you can view past conversations, and/or select a conversation to continue.



## Technical Support

- If you are experiencing technical difficulties or are unable to log in, contact ATB at [ivaluasupport@atb.com](mailto:ivaluasupport@atb.com)

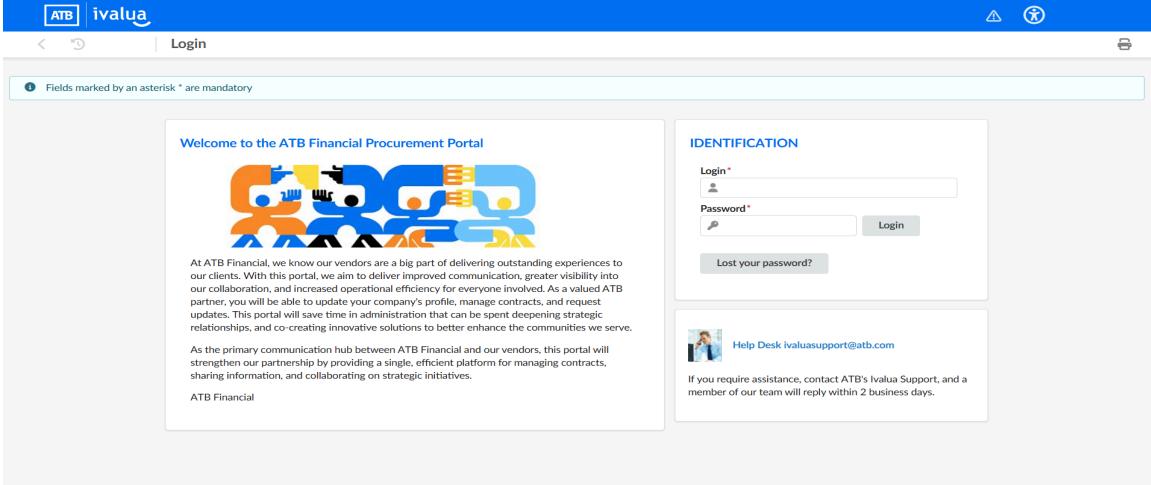


# Onboarding Details (Reference)

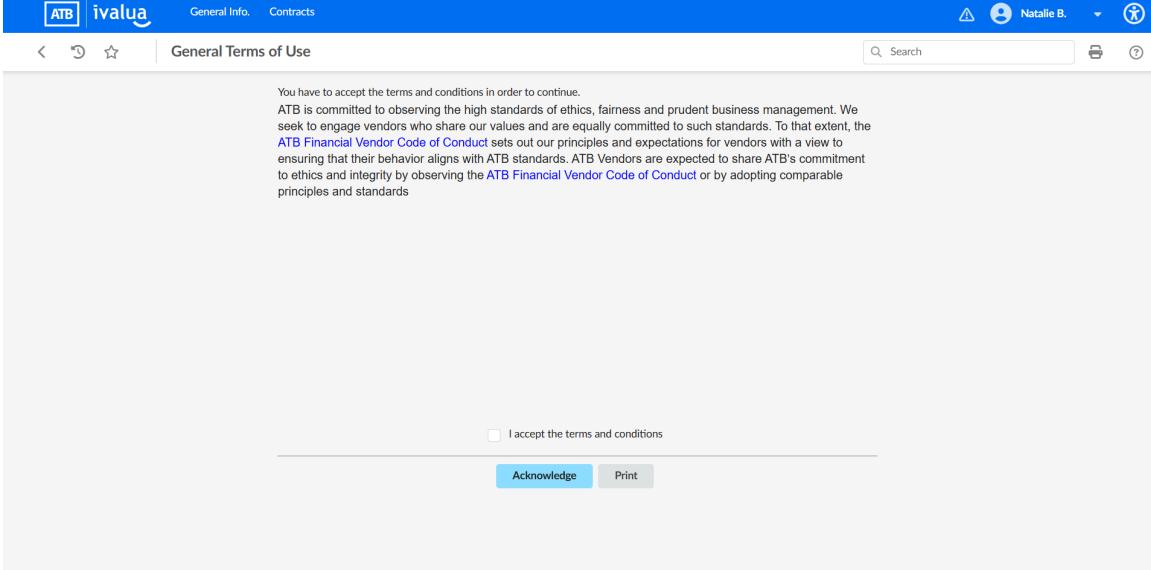
## Onboarding Steps

Step	What You Need to Do	Where to Go
1	Log in to the ATB Ivalua Vendor Portal using the link provided by ATB	ATB Ivalua Vendor Portal Login Page
2	Review and acknowledge the General Terms of Use (first login only)	General Terms of Use Page

**ATB Ivalua Vendor Portal Login Page (Step 1)**



**General Terms of Use Page (Step 2)**





Step	What You Need to Do	Where to Go
3	Navigate to your <b>Company Profile</b> to begin onboarding	Vendor Portal Home Page → General Info. Menu → Company Profile

ATB ivalu General Info. Contracts

Company Profile

Information Requests

Announcement

You have now logged onto our vendor portal. As a trusted vendor, this portal is your one stop-shop for maintaining all aspects of your relationship with us.

ATB is committed to observing the highest standards of ethics, fairness and prudent business management. We seek to engage vendors who share our values and are equally committed to such standards. To that extent, the [ATB Financial Vendor Code of Conduct](#) sets out our principles and expectations for vendors with a view to ensuring that their behavior aligns with ATB standards. ATB Vendors are expected to share ATB's commitment to ethics and integrity by observing the [ATB Financial Vendor Code of Conduct](#) or by adopting comparable principles and standards.

If you encounter any issues, please reach out to your ATB contact for support. If you require further assistance, contact our helpdesk directly at [ivaluasupport@atb.com](mailto:ivaluasupport@atb.com).

Onboarding Progress

- ✓ Registration Onboard Pending
- ✓ Preparation Gather Information
- ✓ Enrollment Rev. Review Information
- ✓ Active Vendor Onboard Complete

My To-Do List

There is no item requiring your attention at the moment.

4	Review and complete required company information	Company Profile → Company Information
---	--	---------------------------------------

ATB ivalu General Info. Contracts

Company Info Global Insights (CANADA)

Save

Fields marked by an asterisk \* are mandatory

Company

Payee Name \* Global Insights

Legal Name \*

Operating As

Website

Minority- and/or Women-owned Business Enterprise (MWBE) Categories

Is your organization an Indigenous owned business? No

Address

Address Label

Floor Number

Room Number

Address Line 1 \* Search for an address...

Address Line 2

Zip Code/Postal Code \*

City \*

Country \* CANADA

Legal Information

Legal Structure \* Place Of Registration

Year Founded

Business Number (BN)

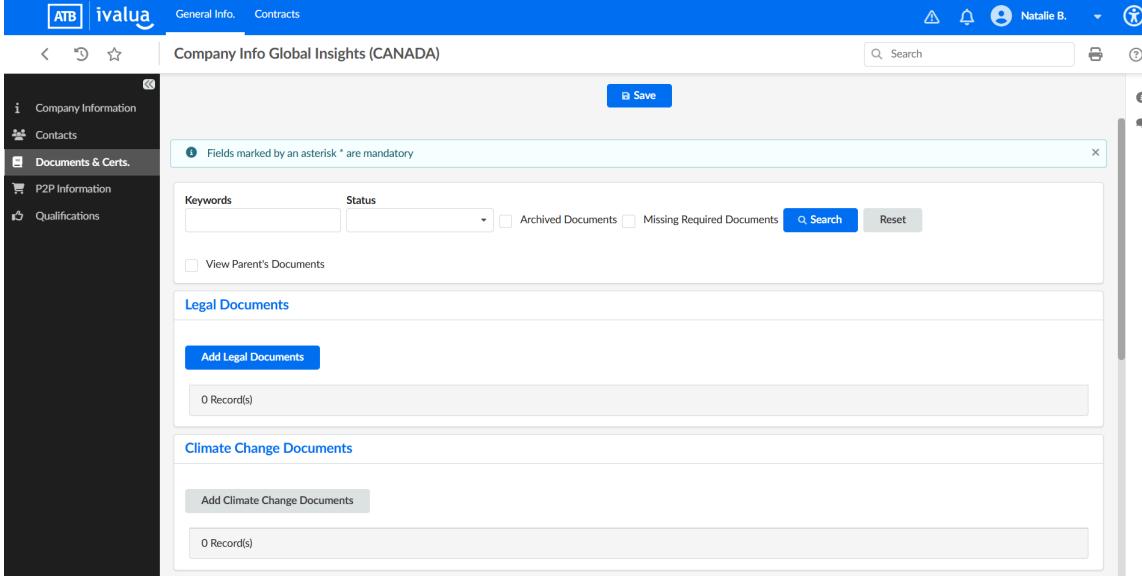
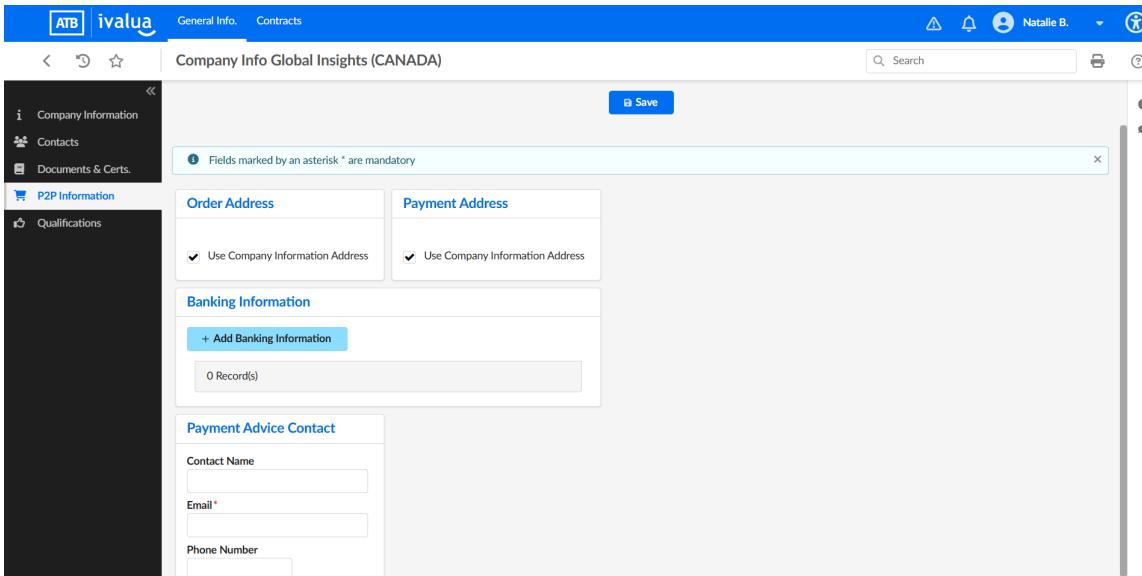
DUNS \*

Does your organization have WCB coverage?

GST Exemption

As an agent of the Crown and a tax free Government of Alberta entity, ATB Financial and its subsidiaries ATB Investment Management Inc., ATB Insurance Advisors Inc., ATB Securities Inc. are not subject to Goods and Services Tax (GST), Harmonized Sales Tax (HST), Provincial Sales Tax (PST) or Quebec Sales Tax (QST). To ensure prompt payment of invoices, do not include GST, HST, PST, or QST on the invoice. The GST Exemption Number is R124072513.



Step	What You Need to Do	Where to Go
5	Upload required documents	Company Profile → Documents & Certs
		
6	Enter banking information and payment details (if applicable)	Company Profile → P2P Information
		



Step	What You Need to Do	Where to Go
7	Save your changes and submit onboarding information	Click <b>Start On-Boarding</b> when all information and documents are complete

