



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

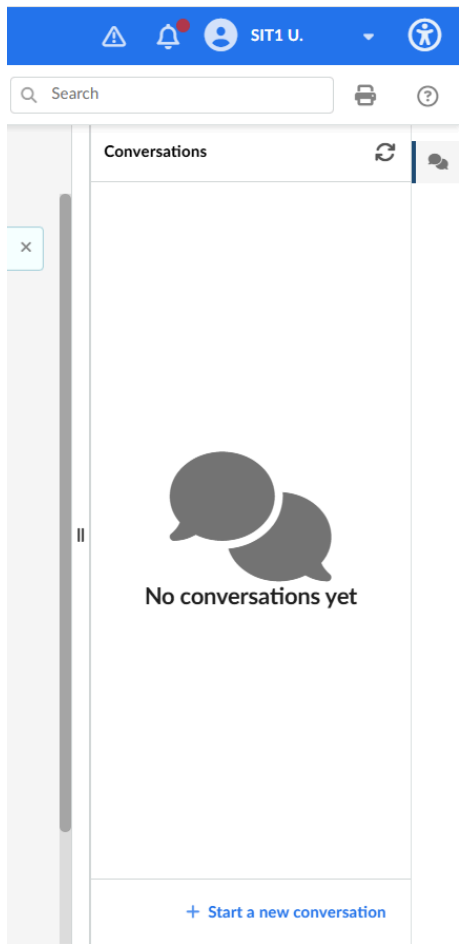
Need Help?


Onboarding Support

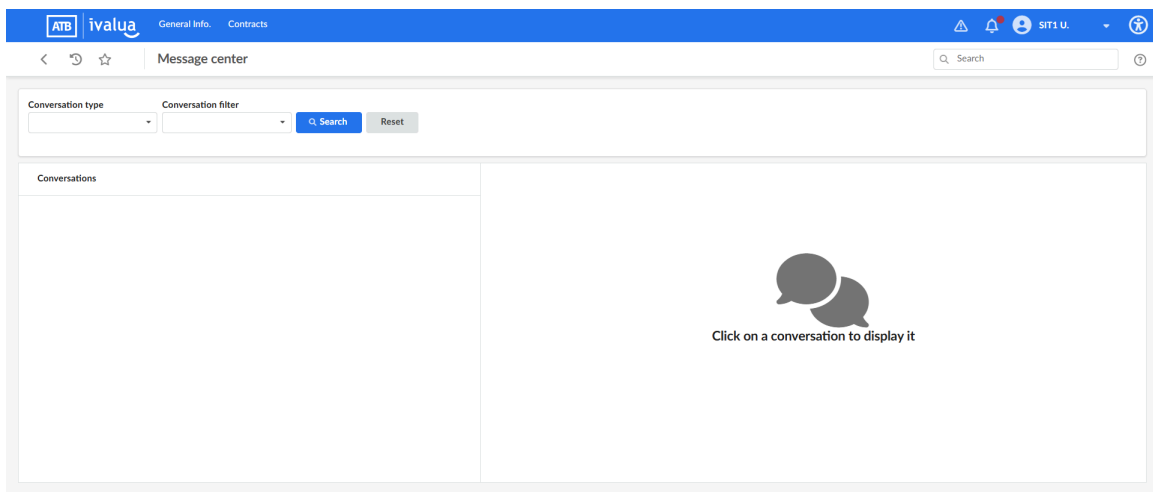
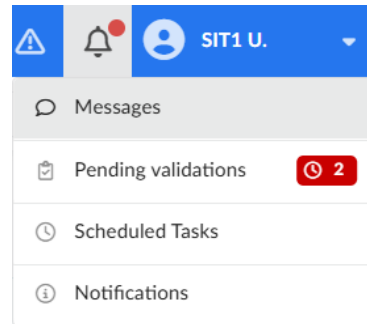
- Contact your **ATB representative** using the **Conversation** feature in the **right-hand panel** in the Company Profile or the **Notifications** feature in the **header bar**

Click on the **Conversations**  icon in the right-hand panel to open the Conversations panel.

Click on the **+ Start a new conversation** link at the bottom of the Conversations panel to begin a discussion.



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.

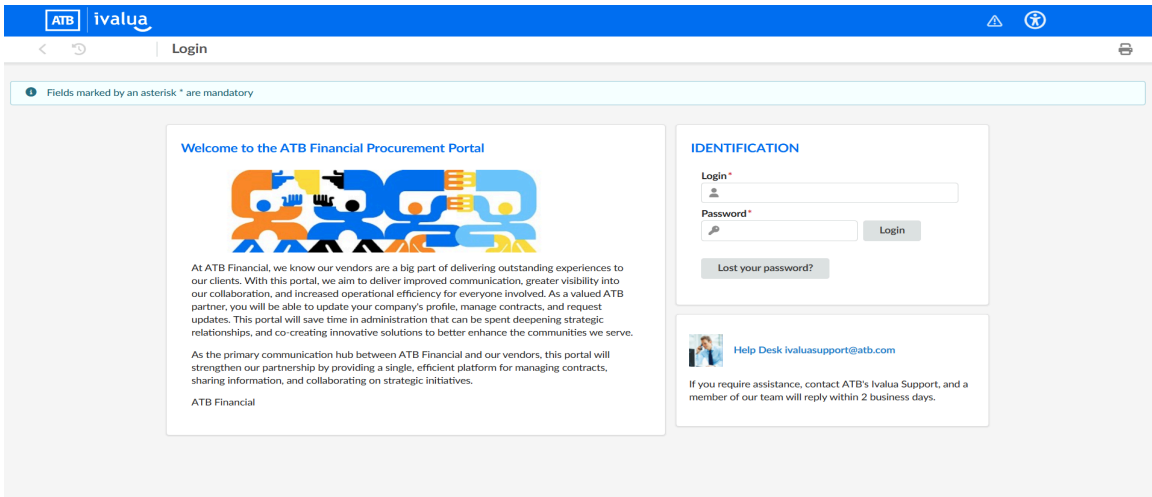
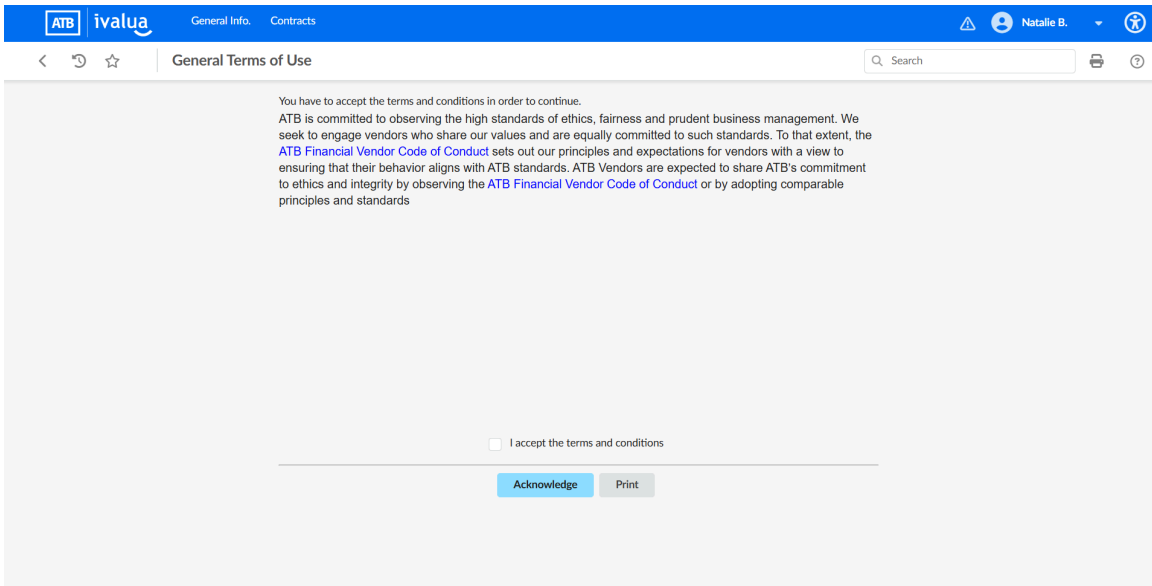


Technical Support

- If you are experiencing technical difficulties or are unable to log in, contact ATB at ivaluasupport@atb.com

Onboarding Details (Reference)

Onboarding Steps

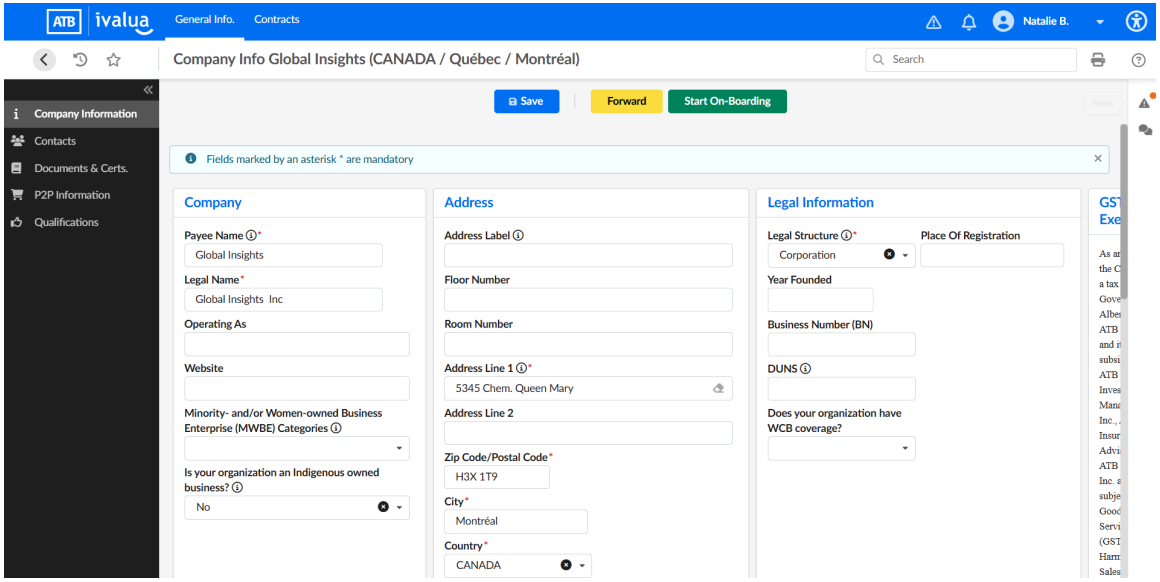
Step	What You Need to Do	Where to Go
1	Log in to the ATB Ivalua Vendor Portal using the link provided by ATB	ATB Ivalua Vendor Portal Login Page
		
2	Review and acknowledge the General Terms of Use (first login only)	General Terms of Use Page
		

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

4	Review and complete required company information	Company Profile → Company Information
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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 Start On-Boarding when all information and documents are complete



ATB ivalua General Info. Contracts

Company Info Global Insights (CANADA / Québec / Montréal)

Save Forward Start On-Boarding

Fields marked by an asterisk * are mandatory

Company

Payee Name *
Global Insights

Legal Name *
Global Insights Inc.

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 *
5345 Chem. Queen Mary

Address Line 2

Zip Code/Postal Code *
H3X 1T9

City *
Montréal

Country *
CANADA

Legal Information

Legal Structure *
Corporation

Place Of Registration

Year Founded

Business Number (BN)

DUNS

Does your organization have WCB coverage?

Company Information
Contacts
Documents & Certs.
P2P Information
Qualifications

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