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Ramp
Employee Training

UPS
Auto-coding...
$331

$63.23
↓
¥9095.95

R.Estate

71 5TH AVE
New York, NY, 10003

Invoice date   05/03/23
Invoice #   CI-14884
Due date   05/31/23

Invoice total $27000

Qty	Description	Unit price	
1	Rent, 1 Month	$25,000	

CI-1488

Agenda

01 Employee Basics

02 Manager Basics

03 Platform Demo

04

Basics for Employees

Accept your invite, get your cards, and submit policy requirements

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ramp   **VISA**

Staples

$240.20   In policy

$XXXX
money savings

XXXX
time savings

Accepting your invite

Check your inbox for an email from Ramp
Look for the following in your inbox:
Sender: communications@ramp.com
Subject Line: "Join [Company Name] on Ramp"

Click on the "Accept Invite" button to create your account
Follow the prompts on screen to be guided through account creation and setup

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ramp ⏋

Join Peter Robinson on Ramp.

Peter Robinson (mhavandjianbegalli+owner@ramp.com) has invited you to join **Mhavandjianbegalli's Pizza Watering Hole** on Ramp.

This invite will expire in 14 days, on Oct 03, 2023. If you have any questions or issues, please **submit a ticket** to our support team.

Accept Invite

Best,
The Ramp Team

Ramp Business Corporation
71 5th Avenue, 6th Floor, New York, NY 10003

Ramp Help Center

Communication Preferences

Notification Formats
SMS
Email
Push notifications (on mobile)

Recommendations
SMS or Push for physical card
Email for virtual card(s)
Email for weekly reminders and automatic receipt capture

How it works
Go to Settings >> Communication Preferences

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Search ⌘ K

My Ramp 1

Settings

Personal Settings

Profile   Banking   Login Methods   Delegation   **Notifications**

Notification Type	SMS	Email
Personal	▬	✅
› Weekly Reminders for Missing Items	—	✅
› Missing Items (In Person)	✅	✅
› Missing Items (Online)	☐	✅
› Automatic Receipt Capture	—	✅
› Receipt Successfully Captured	—	✅
Commenting		✅
› New Mention		✅
› New Comment		✅

Marketing Emails   View marketing preferences ↗

⚙ Settings

Personal Settings

Sign Out ⤴

🎁 Refer & Earn

? Help

Adding other emails

You can add other emails to Ramp that you'd like to be able to forward receipts from.

How to set it up

Go to Settings >> Edit Profile >> add relevant emails under Receipt Forwarding

Important to Note

Your receipt will fail to match with the corresponding transaction if you forward it from an email that is not linked to your Ramp account

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⌄

Setup Guide
Next: Get a quick tour of Ramp

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Inbox   999+
Insights
My Ramp

Transactions   94
Cards
Spend Programs
Reimbursements
Bill Pay
Accounting

People
Vendors

Settings
  Company Settings
  Expense Policy
  Integrations
  Personal Settings
  Ramp Developer
  Sign Out   →

Refer & Earn
Help

Settings

Personal Settings

Profile   Banking   Login Methods   Delegation   Notifications

PR   **Peter Robinson**
      Owner

✉ Forward receipts from your personal email   ✕
Add in your personal email address to forwards receipts from and Ramp will
automatically match them to your transactions. Add my email. ↗

Company Name   Location
Mhavandjianbegalli's Pizza   New York City
Watering Hole

Department
Executive

Phone Number
–

✎ Edit Profile

←   ✕

Edit Profile

mhavandjianbegalli+owner@ramp.com

First Name *   Last Name *
Peter   Robinson

Email Address
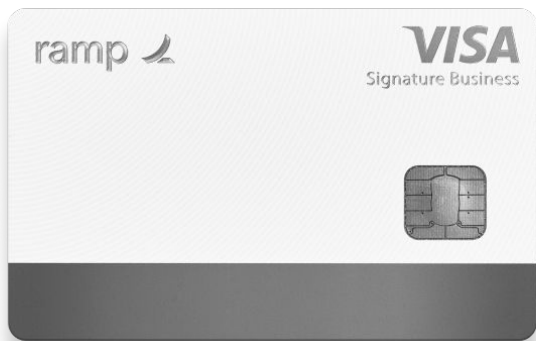mhavandjianbegalli+owner@ramp.com   ⊘

Country #
🇺🇸 US ⌄   Phone Number   Verify

Receipt Forwarding

Enter or paste email addresses

Receipts forwarded from these email addresses will be automatically matched to your transactions or any transactions
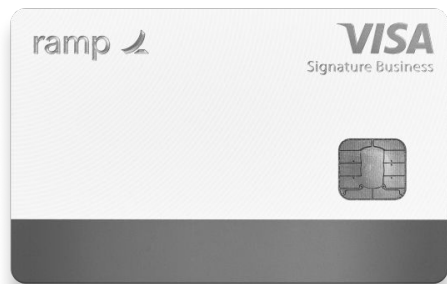on your business's Ramp account. Learn more ↗

Using your new Ramp card

- 1 physical card and unlimited virtual cards/person

- If you were invited to receive physical card, it will arrive in 3-5 business days

- While you're waiting for your physical card you can go ahead and use the virtual card that was generated. Once your physical card arrives and you activate it, you can you that or the virtual card.

- Ramp cards work with Apple Wallet and Google Pay

- There may be category and/or merchant restrictions on your card(s) set by admins

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VISA
Signature Business

Kitchen $120.24

Grand Hotel $835.72

Lyft $34.48

Parking   Airlines   Electronics   Clothing

Physical vs Virtual cards

Physical Card
Use for any in-person transactions! Travel, Meals, etc.

Virtual Card(s)
Used for recurring business expenses like subscriptions, office equipment, etc. or individual purposes like benefits.

Important to Note
Different cards may be subject to different receipt and memo requirements. Ramp will remind you of what you need to submit by SMS, push or whatever you have configured.

Certain cards, such as subscription cards, can have restrictions that will make them not work on specific categories or will only work for a specific vendor. This makes them extra safe.

💡 If you have multiple virtual cards, anything you buy with your physical card will be auto-matched to the right virtual card. When we're not sure, we'll message you to confirm, and you can reassign transactions if necessary.

Requesting virtual cards

When?
If you need an expense or vendor specific card

How?
• Log in
• Go to My Ramp
• Click the yellow button that says "Request Spend" on the top right of the screen
• Select "Virtual Card"
• Fill in desired spending details
• Submit for approval

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Receipt matching - SMS

How it works?

Respond to Ramp's automated text, follow the instructions on how to submit info in that text message

💡 Pro Tip: Save our number in your phone: HIRAMP (447-267) or 516-284-1304

Or text us directly at any time with a picture of your receipt(s)

In order to submit a memo, you'll need to respond to our automated text requesting a memo. You can't just text us at any time to submit memos to past transactions
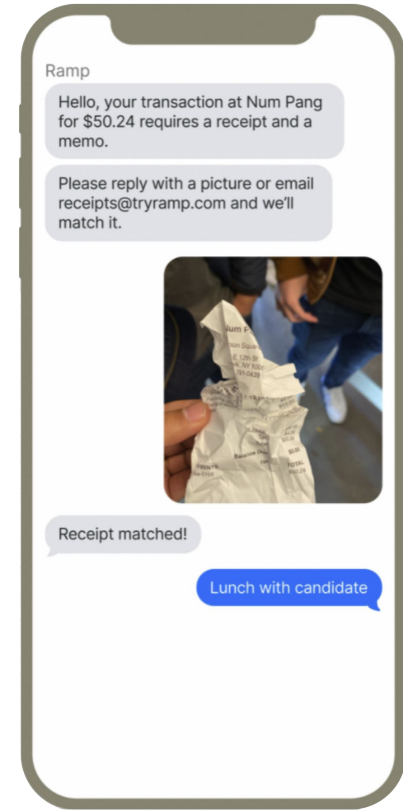
Receipt matching - Email

How it works?

• Wait for Ramp to email you about your online purchase

• Attach receipts/invoices to this email if prompted (we accept PDF, JPG, and PNG images)

• Type your memo directly into the memo box in the body of the email, then click "Submit"

You can also forward receipts/invoice to receipts@ramp.com

• Can be in the body of the email or attached

• You can send more than one receipt in the same email

• Include a memo by writing "Memo: enter memo here" into the body of the email but this workflow only works when sending individual receipts

💡 Add your personal email to your Ramp account so you can submit receipts from there as well. Settings >> Edit Profile

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Receipt matching - Mobile App

How it works?

• Download the iOS or Android app in the App store

• Click the transaction and attach an existing photo or take a photo within the app

• Type your memo into the memo field
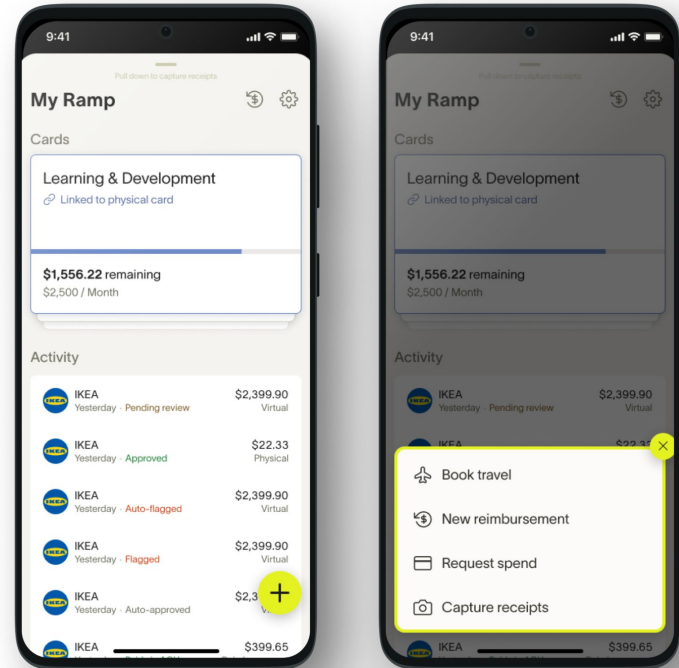
Submitting reimbursements

How it works
- Log in
- Go to Reimbursements
- Click the yellow button that says "Create Reimbursement" on the top right of the screen
- Fill in required information
- Submit for approval
- Managers will review, edit, approve, or reject
- Once approved, you will receive your payment within 2-3 days

💡 Email your receipt to reimbursements@ramp.com and Ramp will start generating a draft reimbursement for you

Cash tips can be recorded manually on the receipt

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Coding your transactions

What is means

Assigning information to a transaction to tell your finance team how to account for that expense

How it works

• **Card Level Rules** - automate coding of some fields
• **Manual coding** - All manual coding has to be done on either the Ramp dashboard or IOS mobile app:
• SMS and Email notifications will contain a hyperlink that will open the relevant transaction in Ramp on your web browser
• Ramp App will indicate your transactions missing items

Policy
Prepaid requires Receipt, Memo, Category

Transaction State
Auto-Approved

Policy Requirements
2 Missing Policy Requirements

— Receipt
— Memo
✓ Accounting Category
✓ Accounting Expense Department

Dismiss Requirements

Receipts

Search for this transaction in Gmail ↗

Drop files or click here to upload

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Flagging transactions

Reasons to flag
• Accidental (personal charge)
• Dispute (possible fraud)
• Out of Policy (Card Managers + Admins only)

How it works
• Click on the transaction in your Ramp dashboard
• Scroll to the bottom of the transaction window that pops up
• Click the red Flag button and select the relevant flag type

$7.00

September 16, 2023 at 4:52 AM

Overview   Activity

JB   **Jean Brown**
General Expenses Card (4064)

Amazon Tips
AMAZON TIPS

General Merchandise   amazon.com/gp/prime

Change Limit

Report Incorrect Info

Flag as Accidental

Dispute Transaction

More

Add to Trip   Repay
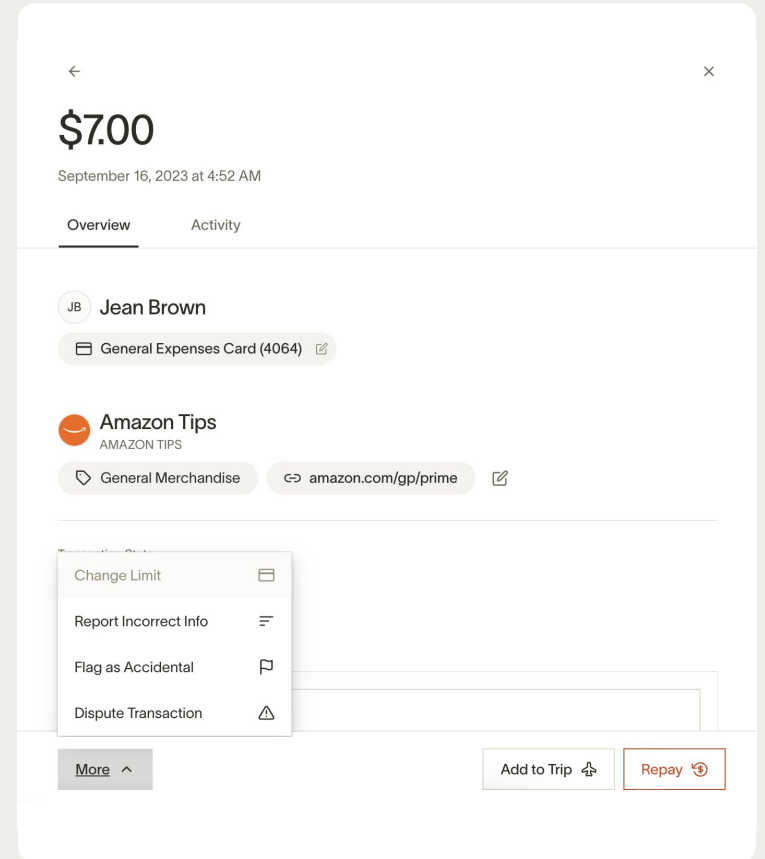
Communications from Ramp

Card limit warnings

T&E Card has reached 90.0% of its limit

Hi Jacopo,

This is a friendly reminder that you've reached 90.0% of your monthly card limit for T&E Card ($73.80 spent from $80.00 limit). If you go over your limit, transactions will start being automatically declined.

Your monthly balance resets on Apr 01, 2022.

You can modify this card or issue a new one from your dashboard.

Amount Spent	Monthly Spend Limit
$73.80	**$80.00**

Card Type	Virtual
Card Name	T&E Card
Spend Limit	$80.00
Auto-Lock	No Date

Increase Limit

Out of policy

Nickolas's transaction was automatically flagged as out of policy.

Hi Nickolas,

Your recent transaction of $782.22 at United Airlines was automatically flagged by a policy rule.

Rule: the flight booked exceeded the total permitted trip flight spend of $750.00

You can reply-all to this email to start a conversation with your team at Gnelson's Chicken Eatery or visit Ramp for more options.

View Transaction

Best,
The Ramp Team

Ramp Business Corporation
71 5th Avenue, 6th Floor, New York, NY 10003

Updates

An update to your "Wellness Benefit" card.

Hi Nickolas,

An admin has made changes to your "Wellness Benefit" card. We've outlined the changes below.

Card Details:

This card can spend on:
All categories and all merchants.

Card Name	**Wellness Benefit**
Spend Limit	**$100.00 Monthly**
Policy	**General Expenses** → **Client Spend**
Auto-Lock Date	**Mar 12, 2024**
Card Type	**Virtual**
Transaction Amount Limit	**None**

Submission Policy

Client Spend

Receipt

required for transactions above $75.00	→	required for transactions above $100.00

Memo

None	→	required for transactions above $100.00

Access Card

Approvals

Your card request was approved

Hi Zelma,

Your request for a "Gas Card" card was approved.

Card Details:

This card can spend on:
All categories and all merchants.

Card Name	**Gas Card**
Spend Limit	**$100.00 Monthly**
Policy	**General Expenses**
Auto-Lock Date	**No Date**
Card Type	**Virtual**

Submission Policy

General Expenses

Receipt required for transactions above $75.00

Access Card

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Basics for Managers

Transaction and reimbursement reviews, approvals, and policy

Today

Out-of-policy spend

⚠ Weekend charge	✓	🚩	$46.96

Controller

⚠ Large tab	✓	🚩	$376.78

⚠ Duplicate receipt	✓	🚩	$14.30

XXXX
time savings

$XXXX
money savings

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Manager review

When?
If you need an expense or vendor specific card

How it Works
• Review your team's transactions to ensure they are legitimate, on budget and fulfill all required documentation
• Transactions >> Needs Review or Inbox

Actions to take:
• **Approve** - Transactions that have receipt, memo, coding and are legitimate business expenses
• **Flag** - Transactions that are not legitimate business expenses or you need additional context
• **Wait** - Transactions that are missing receipt, memo and coding. Ramp will automatically remind employees so you don't have to!

> 💡 Leverage filters to streamline the review process.
> Recommended filters: My Team, Submission Policy Complete

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Search ⌘ K

Inbox 847

Insights

My Ramp

Transactions

Cards

Reimbursements

Team

Vendors

Settings

Refer & Earn

Help

Inbox 170

Card Requests 15   **Transactions**   Reimbursements 155   Purchase Orders

Search & Filter   Date Range

Total Count
677

Total Amount
$258,785.63

	Date	Amount	Cardholder	Policy Information	Limit	Receipt	Memo	Flag or Approve
Deselect 4								
☑ Robert's trip to Newark								
☑	Exxonmobil 09/16/2023 · Fuel and Ga... Requirements Complete	$16.33	Robert Williams Manager: John Johnson	—	Wellness Virtual · 3983	—	Travel	🏳 ✓ ⋮
☑	Miami Parking Author... 09/16/2023 · Parking · Ro... Requirements Complete	$3.75	Robert Williams Manager: John Johnson	—	Wellness Virtual · 3983	—	Travel	🏳 ✓ ⋮
☑	Soho Beach House 09/16/2023 · Restaurants... Requirements Complete	$20.40	Robert Williams Manager: John Johnson	—	Wellness Virtual · 3983	—	Lunch	🏳 ✓ ⋮
☑	Miami Parking Author... 09/14/2023 · Parking · Ro... Requirements Complete	$6.50	Robert Williams Manager: John Johnson	—	Wellness Virtual · 3983	—	Parking at Gensler. Office buildout	🏳 ✓ ⋮
☐ Anna's trip to Detroit								
☐	Sweetgreen 09/15/2023 · Restaurants... Requirements Complete	$16.88	Anna Miller Manager: John Johnson	—	SaaS Virtual · 2837	—	—	🏳 ✓ ⋮
☐ Kevin's trip to Las Vegas, San Francisco, and Baltimore								
☐	Duane Reade 08/20/2023 · Supermark...	$3.26	Kevin Davis	—	Work From Home	—	—	🏳 ✓ ⋮

4 transactions selected (select all 50) · $46.98   ⋮   Remind (0)   Flag (4)   **Approve (4)**

Manager review

Resolving out of policy transactions
Flagged transactions can be found via Transactions >> Out of Policy

Pending - Current Out of Policy flags that still require action

Resolved - Past Out of Policy flags that have been handled

Resolve an Out of Policy transaction when manager has the context they need and provides their approval

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Thank you.

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