



Just some of the industry leaders that chose Ramp:

Glossier.



BARRY'S

MORNING BREW

FORTUNE

C1 CONSTRUCTION ONE

ramp.com

Ramp Card + Expense

Deliverable/Task

Link to Guide + Description

Pre-Work before Kickoff Call (est time: 20 minutes)

Complete tasks prior to meeting your Customer Success Manager

- | | |
|--|---|
| 1. Sign into Ramp | Ramp Sign-In |
| 2. Link & Verify bank account(s) | Bank Account |
| 3. Compile last 12 months card transaction history | Email CSV file to Customer Success Manager |
| 4. Invite admin and bookkeepers | User Overview |
| 5. Integrate ERP | Connect Ramp to Accounting Provider |

Kickoff & Initial Account Setup

Connect your accounting integration, configure expense policies and approval workflows, issue first Ramp card, and align on go-live date

- | | |
|--|---|
| 1. Set up expense policy | Expense Policy |
| 2. Set up spend requests approval workflows (transactions) | Spend Request Approvals |
| 3. Set up spend requests approval workflows (reimbursements - if applicable) | Spend Request Approvals |
| 4. Create initial physical and virtual cards | |
| 5. Process first transaction(s) | |
| 6. Create spend programs (if relevant) | |
| 7. Align on org-wide change management plan | Receive Email Template from CSM |

Accounting Optimization

Create accounting rules, sync and test your first Ramp card transaction, and finalize expense management setup

- | | |
|---|---|
| 1. Set up accounting rules | Set Up Accounting Rules |
| 2. Configure custom workflows for accounting fields | |
| 3. Sync (export) card transactions to accounting provider | |
| 4. Enable separation of duties for admins, if relevant | |

Initial Launch

Migrate key card spend onto Ramp, continue testing, and prepare for Ramp rollout for all employees

- | | |
|--|----------------------------------|
| 1. Book employee training | |
| 2. Review and upload final employee list | |
| 3. Send org-wide communications | Receive Add't Resources from CSM |

Launch

Complete vendor spend migration to Ramp and roll out Ramp cards to all employees

- | | |
|---|---|
| 1. Finalize any outstanding items from previous calls | |
| 2. Confirm spend controls and approval layers for remaining employees | |
| 3. Run employee training | |
| 4. Complete vendor migration to Ramp card and bill pay | Migrate Your Card Vendors |