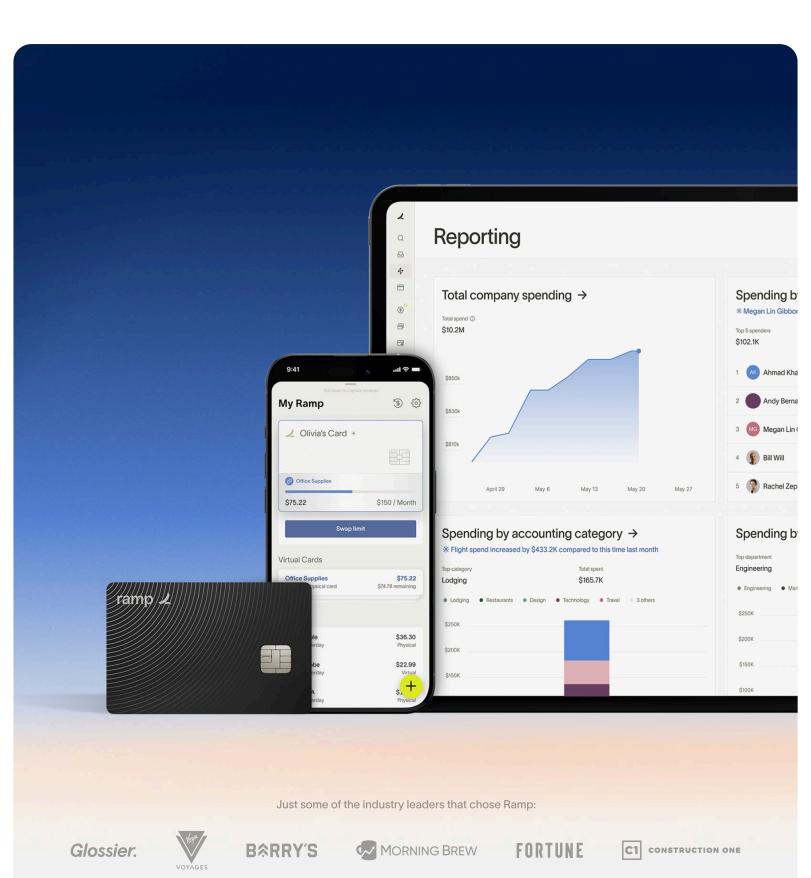
Switching 101 ramp 2



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Resources To Get Started

- 1. Admin guide
- 2. Getting started as a user
- 3. On demand training
- 4. Explore product
- 5. Pricing overview

Pre-Work Before Kickoff

1. Sign into Ramp

2. Link & verify bank account(s)

3. Compile last 12 months card transaction history

4. Invite admin and bookkeepers

5. Integrate ERP

Ramp Sign-In

Bank Account

Email CSV file to Customer Success Manager

User Overview

Connect Ramp to Accounting Provider

Sample Internal Communications

Hi Team,

We're excited to share that we are transitioning to $\underline{\mathsf{Ramp}}$ for our corporate card and expense management.

• With Ramp, we will be handling all of our company's AP spend in a single place. Ramp Bill Pay provides the ability to email or upload our invoices and create, approve, and pay bills in under 60 seconds. We sync every bill and every payment to our accounting software.

Important Dates

- We will be migrating over to Ramp the week of <go live week>.
- On <go live date> you will receive an automated email from Communications@ramp.com with instructions on how to set up your Ramp account. If you do not see the invite in your main inbox, please check your spam folder.

Next Steps

- 1. Set up your Ramp Account: This takes roughly 3-5 minutes you'll be guided through the process on screen. Please complete your account setup by <insert a date to keep us on track>.
- 2. Download Ramp Mobile App: Download the IOS App from the App Store in any country here and the Android app from the Google Play Store in any country here.

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Sample Internal Communications

Hi Team,

We're excited to share that we are transitioning to Ramp for our corporate card and spend management needs - check out this video to learn more!

- Ramp provides flexible physical and virtual cards making it easier to manage your recurring payments each month.
- You no longer need to manually submit receipts or expense reports each month Ramp automatically matches receipts for you via both SMS and email.

Important Dates:

- We will be replacing current cards with Ramp cards that will arrive / land in your inbox the week of <go live week>.
- On <go live date> you will receive an automated email from Communications@ramp.com with instructions on how to set up your Ramp account and access your Ramp card(s). If you do not see the invite in your main inbox, please check your spam folder.

Next Steps:

- 1. Set up your Ramp Account: This takes roughly 3-5 minutes you'll be guided through the process on screen. Please complete your account setup by <insert a date to keep us on track>.
- 2. Download Ramp Mobile App: Download the IOS App from the App Store in any country <u>here</u> and the Android app from the Google Play Store in any country a.
- 3. Click here for best practices on submitting receipts and memos

Quick Start Videos:

- Here are video walk throughs for the IOS App and the Android App
- Here are video walk throughs for Employees and for Card Managers

We're really excited about this transition and would love to hear your feedback as we get settled in at Ramp.